Warsaw School of Economics

REGIONAL INVESTMENT ATTRACTIVENESS 2014

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Report prepared for the Polish Information
and Foreign Investment Agency
at the Institute of Enterprise, Warsaw School of Economics
Warsaw, December 2014

2014

POLISH INFORMATION AND FOREIGN INVESTMENT AGENCY

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PAIiIZ provides free of charge professional advisory services for investors, including:

- investment site selection in Poland,
- tailor-made investors visits to Poland,
- information on legal and economic environment,
- information on available investment incentives,
- facilitating contacts with central and local authorities,
- identification of suppliers and contractors,
- care of existing investors (support of reinvestments in Poland).

Besides the **OECD National Contact Point**, PAIiIZ also maintains an Information Point for companies which are interested in European Funds. All of the Agency's activities are supported by the **Regional Investor Assistance Centres**. Thanks to the training and ongoing support of the Agency, the Centres provide complex professional services for investors at voivodship level.

On the website **www.paiz.gov.pl** an investor can find all the necessary information concerning key facts about Poland, Polish economy, legal regulations in Poland and detailed information which could be useful for any company wanting to set up a business in Poland.

Since 2011 China – Poland Economic Cooperation Centre operates in PAIiIZ as a "one-stop shop" providing comprehensive information on investment opportunities in Poland and offering support for Chinese companies during the investment process. The Centre is responsible for: promotion of Poland as a location for FDI, identifying sources of foreign direct investment, supporting the missions and delegations from China, preparing analysis & information, maintaining regular contact with Chinese companies operating in Poland, Go China Project. More information you can find on: **www.gochina.gov.pl.**

Also since 2013 PAIiIZ is implementing the **"Go Africa"** program. Its aim is to encourage Polish entrepreneurs to enter the African markets and to promote Poland in Africa. Therefore PAIiIZ is organizing: fact finding missions to African countries, participation of Polish entrepreneurs in fairs, conferences, seminars and workshops both in Poland and in Africa. Furthermore the Agency is preparing publications on African markets. More information you can find on: **www.goafrica.gov.pl.**

INTRODUCTION

The report has been prepared to order of the Polish Information and Foreign Investment Agency and is the next edition of the regional investment attractiveness reports. The reports have been published since 2008. They are the result of scientific research conducted since 2002 under the supervision of H. Godlewska-Majkowska, Ph.D., university professor of the Warsaw School of Economics, in the Institute of Enterprise, Collegium of Business Administration of the Warsaw School of Economics. All the authors are the core members of a team that develops methodology of calculating regional investment attractiveness.

The report consists of a few parts. The first part includes the synthetic presentation of the voivodship's economy, including social-economic potential of the voivodship and the level of economic development as well as economy structure. The most important socio-economic data, including information on investment attractiveness, is presented in a table. The first part of the report also presents the position of the voivodship compared to other Polish and European Union regions, paying special attention to the most important industries and high potential sectors.

The second part of the report presents internal diversification of voivodship's investment attractiveness at the levels of counties (Polish: *county*) and communes (Polish: *gmina*). The results of the investment attractiveness calculations for the Lower Silesian voivodship's territorial units can be compared to the other territorial units from all of the Polish regions as the calculations have been made for all of them.

In the third part of the report the main business environment institutions in the voivodship are presented, taking into consideration kinds of support which they offer to investors. This part also includes information on location of the Special Economic Zones (SEZs) in the voivodship and information on the results of their activities. The third part of the report is completed by the presentation of the results of the 'A' Commune ranking. The ranking made it possible to point out such communes that are not only attractive for potential investors but also offer them well-prepared information on the Internet.

The report is completed with the Appendix including tables with comparisons of investment attractiveness indices for voivodship's counties and communes. There is also some more detailed information in the Appendix concerning effects of functioning of the Special Economic Zones in the region.

There are two approaches to the investment attractiveness presented in this work. One of them is **potential investment attractiveness**, defined as a set of regional location advantages that influence achieving investors' goals (such as costs of running a business, sales revenues, net return on investment and investment's competitiveness).

Another approach is **real investment attractiveness**, defined as region's ability to create investor's satisfaction and influence absorption of financial and physical capital in form of investments. They can be measured by effectiveness of capital spending.[1]

1. More information on this topic can be found in: *Atrakcyjność inwestycyjna regionów Polski jako źródło przedsiębiorczych przewag konkurencyjnych*, H. Godlewska-Majkowska (ed.), Studia i Analizy Instytutu

Potential investment attractiveness indices in their simplified version (PAI1) measure the location-specific advantages of regions. They are calculated for territorial units of various levels of statistical division of the country (communes – Polish: *gmina*, counties – Polish: *powiat*, subregions, voivodships/regions). These indices refer to the whole national economy and to the selected sections: C – manufacturing industry, G – trade and repair, I – tourism and catering, M – professional, scientific and technical services. These sections are the core of the national economy.

Besides, some indices are calculated only for the voidoships, on the basis of characteristics available only on the regional or macroregional level which allows evaluating their investment attractiveness in a much broader context. These are PAI2 indices, which are calculated both from a general point of view and with reference to the above mentioned sections of the economy.

What is more, ranks of real investment attractiveness, which relates to the inflow of capital (in the form of investments) and the effects of investments considered from a point of view of productivity and returns on the outlays made, are used in this report. Real investment attractiveness can be calculated for voivodships, based on the statistical data available on the regional level.

The measurements in use are subject to annual review thanks to consulting them with foreign investor assistance institutions and direct contact to territorial self-government units as well as organizations of entrepreneurs. A description of methodological approach to measuring investment attractiveness of Polish regions, counties and communes can be found online on the website of the Institute of Enterprise at the Warsaw School of Economics (**http://kolegia.sgh.waw.pl/pl/KNoP/struktura/IP/struktura/ZOB/**), as well as in numerous scientific publications and expert opinions.

Przedsiębiorstwa, Oficyna Wydawnicza SGH, Warszawa 2012; H. Godlewska-Majkowska, *Polish regions and their investment attractiveness in the EU*, in: POLAND Competitiveness Report 2013. National and Regional Dimensions, M. Weresa (ed.), Oficyna Wydawnicza SGH, Warsaw 2013, pp 299-316.

1. THE PROFILE OF REGIONAL ECONOMY OF LOWER SILESIAN (DOLNOŚLĄSKIE) VOIVODSHIP

Lower Silesian (dolnośląskie) voivodship is one of the three most attractive regions of Poland from investors' point of view.

Its advantages are:

- very high level of economic development, significantly exceeding the national average,
- highly beneficial geopolitical location by virtue of the proximity of Germany and the Czech Republic as well as an attractive location in view of sales markets of agglomerations of Prague, Berlin and Warsaw,
- very well-developed transport infrastructure (roads, railways, waterways, airways) and communications/telecomputer infrastructure:
    - convenient road connections: A4 highway, international roads: E40, E36, E65 and E67,
    - an expanded system of railways: international railways E30 and E59,
    - a well-developed network of water transport (the Oder system enables to ship by barges from Lower Silesia to the port complex of Szczecin-Świnoujście and through the Oder-Spree and Oder-Havel channels. Lower Silesia is connected to the system of inland waterways of Western Europe),
    - Copernicus Airport Wrocław in Wrocław-Strachowice offers international air connections with Frankfurt upon Main, Munich, London, Copenhagen, Milan, Dublin, Nottingham, Dortmund, Shannon, Glasgow, Liverpool, Stockholm, Cork and Rome,
    - a very good access to the Internet (in this respect the voivodship belongs to the highest rated regions in Poland),
- the presence of many higher education institutions among which there are many renowned Polish scientific establishments,
- rich cultural heritage (numerous monuments among which UNESCO World Heritage Sites: The Centennial Hall in Wrocław and the Churches of Peace in Świdnica and Jawor should be noted) and natural conditions (The Sudetes, Sudetian Foreland) set foundations for the development of tourist services,
- a high level of the development of industry which is reflected in the region's specialization in the modern kinds of industrial production (the manufacture of: means of transport, pharmaceuticals, consumer electronics, household appliances/ white and brown goods),
- highly developed agriculture, in particular plant production which is a foundation of the development of food processing,
- numerous locations of special economic zones offering favourable conditions of conducting a business to investors.

The general characteristics of the Lower Silesian voivodship are presented in Table 1.

Table 1. General characteristics of the economy of Lower Silesian voivodship

Feature	Lower Silesian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012 (PLN/person)	47140.9	41439.1	-
Population (persons) on 31 December 2013	2909997	38495659	7.60%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	39855	454986	8.80%
Secondary schools graduates (persons) in 2013	17550	271333	6.50%
Number of employed persons in 2013	1056	15568	6.80%
Structure of employed persons in 2013	agriculture 5.6% industry 34.8% services 59.6%		12.0% 30.5% 57.5%
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	5339.6	79942.6	6.70%
Capital of companies (PLN n) in 2012	17507.2	206992	8.50%
Special Economic Zones (SEZs) in the voivodship*			
– **Kamienna Góra SEZ** – **Legnica SEZ** – **Tarnobrzeg SEZ** – **Wałbrzych SEZ**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	National economy class A Capital-intensive industry class A Labour-intensive industry class A Trade and repair class A Tourism and catering class B		
Real investment attractiveness RAI	National economy class A Industry class A Trade and repair class C Tourism and gastronomy class B Professional, scientific and technical services class B		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Polkowice, city of Wrocław, Lubin, city of Legnica, Wrocław, city of Jelenia Góra	
	Class B	Głogów, Zgorzelec, Wołów, Świdnica	

Communes	Class A	Wrocław (u), Lubin (u), Chojnów (u), Bolesławiec (u), Zgorzelec (u), Świdnica (u), Głogów (u), Karpacz (u), Złotoryja (u), Oleśnica (u), Jawor (u), Lubań (u), Legnica (u), Oława (u), Jelenia Góra (u), Polanica-Zdrój (u), Kłodzko (u), Kamienna Góra (u), Dzierżoniów (u), Świebodzice (u), Duszniki-Zdrój (u), Szczawno-Zdrój (u), Wałbrzych (u), Kudowa-Zdrój (u), Kowary (u), Bielawa (u), Świeradów-Zdrój (u), Piława Górna (u), Boguszów-Gorce (u), Jedlina-Zdrój (u), Zawidów (u), Piechowice (u), Szklarska Poręba (u), Jerzmanowa (r), Kobierzyce (r), Rudna (r), Lubin (r), Grębocice (r), Długołęka (r), Czernica (r), Warta Bolesławiecka (r), Polkowice (u-r), Brzeg Dolny (u-r), Siechnice (u-r), Bogatynia (u-r), Strzegom (u-r), Kąty Wrocławskie (u-r), Prochowice (u-r), Radków (u-r), Oborniki Śląskie (u-r), Żarów (u-r)
	Class B	Nowa Ruda (u), Kunice (r), Bolesławiec (r), Podgórzyn (r), Krośnice (r), Czarny Bór (r), Radwanice (r), Malczyce (r), Zgorzelec (r), Wisznia Mała (r), Strzelin (u-r), Jelcz-Laskowice (u-r), Syców (u-r), Wołów (u-r), Środa Śląska (u-r), Lądek-Zdrój (u-r), Pieńsk (u-r), Góra (u-r), Lubawka (u-r), Sobótka (u-r), Stronie Śląskie (u-r), Chocianów (u-r), Ząbkowice Śląskie (u-r), Szczytna (u-r), Mieroszów (u-r), Trzebnica (u-r), Gryfów Śląski (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 2,914,362 (as of 2013), which is 7.6% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 16.9% of the population at pre-productive age, 64.1% at productive age and 19.0% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 35 higher education institutions in which there are 141,707 students studying, which makes up 9.1% of all students in Poland. Moreover, 6.9% of the secondary school students in the voivodship attend vocational schools and 7% attend technical schools.

The registered unemployment rate in the voivodship amounted to 11.2% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 4011.5, which is 106.4% of the average for Poland.

In 2012 Lower Silesian voivodship made a contribution of 8.6 % to the GDP of Poland. Calculated per capita, it amounted to PLN 47140.9 with the average for Poland PLN 41439.1. With this result the voivodship takes the second place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 209.3% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (59.5%) whereas a share of the agricultural and industrial sectors are respectively 5.5% and 34.8% (Central Statistical Office, Local Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of motor vehicles, trailers and semi-trailers (19% of sold production of the whole voivodship's industry at the end of 2013), manufacture of computers, electronic and optical products (9%), as well as manufacture of rubber and plastic products (7%), manufacture of food products and metal products (6% each).

High development potential of the voivodship and high level of industrialization made Lower Silesian voivodship the main manufacturer of motor vehicles and vehicle parts in the country (19% of the country's sold production in 2013).

The voivodship's position is especially strong among the voivodships specialized in manufacture of computers, electronic and optical products (32% of the country's sold production). It also distinguishes itself as a region that manufactures leather and leather products (25%), textiles (20%), rubber and plastic products (11%), electric appliances (11%), machinery and appliances (11%) and metal products (9%).

When it comes to most of the above-mentioned sectors, the voivodship improved its competitive position within the last three years (measured by its share in the country's sold production) [2]. It applies to the following sectors:

- manufacture of motor vehicles, trailers and semi-trailers, excluding motorcycles,
- manufacture of computers, electronic and optical products,
- manufacture of rubber and plastic products,
- manufacture of textile products,
- manufacture of paper and paper products,
- manufacture of chemicals and chemical products,
- manufacture of fabricated metal products (except machinery and equipment).

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: copper ore and brown coal mining and processing, extraction of rock mineral resources, manufacture of textiles, manufacture of food and beverages, manufacture of wooden products, manufacture of chemical products, production of machines and electrical appliances, production of machinery and electrical apparatus, manufacture of glassware and ceramics, production of components and motor vehicles parts.

For the entrepreneurs willing to invest in Lower Silesian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Lower Silesian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include automotive, electric machines, high-tech and BPO sectors.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Kamienna Góra SEZ, Legnica SEZ, Tarnobrzeg SEZ and Wałbrzych SEZ in the following subzones:**

[2] Calculations based on the Statistical Bulletin of the Lower Silesian Voivodship from the 1st quarter of 2014 and Statistical Bulletin, I quarter of 2014, www.stat.gov.pl (10 November 2014).

- **Kamienna Góra SEZ**, subzones: Dobroszyce (r), Gryfów Śląski (u-r), Janowice Wielkie (r), Jawor (u), Jelenia Góra (u), Kamienna Góra (u), Kamienna Góra (r), Lubań (u), Lubawka (u-r), Nowogrodziec (u-r), Piechowice (u), Prusice (u-r), Zgorzelec (u), Żmigród (u-r),

- **Legnica SEZ**, subzones: Chojnów (u), Chojnów (r), Głogów (u), Gromadka (r), Legnica (u), Legnickie Pole (r), Lubin (u), Miękinia (r), Polkowice (u-r), Prochowice (u-r), Przemków (u-r), Środa Śląska (u-r), Złotoryja (u),

- **Tarnobrzeg SEZ,** subzone: Kobierzyce (r),

- **Wałbrzych SEZ**, subzones: Bielawa (u), Bolesławiec (u), Brzeg Dolny (u-r), Bystrzyca Kłodzka (u-r), Długołęka (r), Dzierżoniów (u), Góra (u-r), Jelcz-Laskowice (u-r), Kłodzko (u), Kłodzko (r), Kudowa-Zdrój (u), Nowa Ruda (u), Nowa Ruda (r), Oleśnica (u), Oława (u), Oława (r), Piława Górna (u), Strzegom (u-r), Strzelin (u-r), Syców (u-r), Świdnica (u), Świdnica (r), Świebodzice (u), Twardogóra (u-r), Wałbrzych (u), Wiązów (u-r), Wołów (u-r), Wrocław (u), Ząbkowice Śląskie (u-r), Żarów (u-r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 25% - 45%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

2. THE PROFILE OF REGIONAL ECONOMY OF KUYAVIAN-POMERANIAN (KUJAWSKO-POMORSKIE) VOIVODSHIP

Kuyavian-Pomeranian (kujawsko-pomorskie) voivodship is situated in the central part of the country. It is renowned for its very well-developed agriculture which has become a foundation of the development of investments in the food industry. Moreover, for industrial traditions and the education system adjusted to the region's needs it is an attractive place for industrial investments.

The advantages of the voivodship are:

- its central location in Poland, where important traffic routes intersect, including lines belonging to the trans-European transport network TEN-T, which facilitates the access to Polish markets and suppliers, both from Poland and abroad,
- a good access to social infrastructure including in particular medical units, sanatoria and health resorts,
- good research and development facilities,
- cultural wealth (numerous monuments among which the Old Town complex of Toruń deserves a note as a UNESCO World Heritage site) and natural conditions (the Kuyavian Lake District and its salt springs) set the foundations for the development of tourism and health services,

- highly developed agriculture, both animal and plant production, both being the foundations of the development of food industry,
- industrial traditions especially in chemical industry, the manufacture means of transport and electronics, which is a factor facilitating the search for contractors as well as higher and vocational education institutions graduates specializing in the fields necessary for the investors in the industry,
- favourable conditions for the development of renewable energy industry,
- the presence of centres supporting the transfer of innovative solutions from the research sector to the industry, e.g. the Centre of Technology Transfer in Toruń.

The general characteristics of the Kuyavian-Pomeranian voivodship are presented in Table 2.

Table 2. General characteristics of the economy of Kuyavian-Pomeranian voivodship

Feature	Kuyavian-Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012 (PLN/person)	33888.1	41439.1	-
Population (persons) on 31 December 2013	2092564	38495659	5.4%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	21561	21561	4.7%
Secondary schools graduates (persons) in 2013	454986	454986	5.3%
Number of employed persons in 2013	14256	14256	4.9%
Structure of employed persons in 2013	agriculture 15.4% industry 30.1% services 54.5%		12.0% 30.5% 57.5%
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	785.0	79942.6	1.0%
Capital of companies (PLN n) in 2012	3129.8	206992.3	1.5%
Special Economic Zones (SEZs) in the voivodship*			
– **Pomeranian**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			

Real investment attractiveness RAI		Industry class C
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)		
Counties	Class A	city of Toruń, city of Włocławek, city of Bydgoszcz, city of Grudziądz
	Class B	
Communes	Class A	Toruń (u), Inowrocław (u), Włocławek (u), Bydgoszcz (u), Grudziądz (u), Chełmża (u), Chełmno (u), Wąbrzeźno (u), Ciechocinek (u), Golub-Dobrzyń (u), Brodnica (u), Osielsko (r), Solec Kujawski (u-r), Świecie (u-r)
	Class B	Kowal (u), Radziejów (u), Rypin (u), Aleksandrów Kujawski (u), Lipno (u), Białe Błota (r), Łysomice (r), Wielka Nieszawka (r), Janikowo (u-r), Barcin (u-r), Nakło nad Notecią (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 2092564 (as of 2013), which is 5.4% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 18.5% of the population at pre-productive age, 63.7% at productive age and 17.8% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 22 higher education institutions in which there are 69486 students studying, which makes up 4.5 % of all students in Poland. Moreover, 7% of the secondary school students in the voivodship attend vocational schools and 5.9% attend technical schools.

The registered unemployment rate in the voivodship amounted to 15.8% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3303.0, which is 87.6% of the average for Poland.

In 2012 Kuyavian-Pomeranian voivodship made a contribution of 4.4% to the GDP of Poland. Calculated per capita, it amounted to PLN 33888.1 with the average for Poland PLN 41439.1. With this result the voivodship takes the 10th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 173.3% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (54.5%) whereas a share of the agricultural and industrial sectors are respectively 15.4% and 30.1% (Central Statistical Office, Regional Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of food products (18% of sold production of the whole voivodship's industry at the end of 2013), manufacture of paper and paper products (13%), manufacture of chemicals and chemical products (11%), manufacture of rubber and plastic products and manufacture of metal products (9% each).

Industrial traditions and favourable location (concerning supplies) made Kuyavian-Pomeranian voivodship the main manufacturer of paper and paper products (20% of the country's sold production in 2013).

The voivodship's position is especially strong among the voivodships specialized in manufacture of chemicals and chemical products (10% of the country's sold production), food products (7%), rubber and plastic products (7%), printing industry, manufacture of metal products and furniture (about 6% each).

When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production) [3]. It applies to the following sectors:

- manufacture of paper and paper products,
- manufacture of rubber and plastic products,
- manufacture of wood, wood and cork products, except furniture; articles of straw and plaiting materials,
- manufacture of fabricated metal products (except machinery and equipment),
- manufacture of furniture,
- manufacture of machinery and equipment.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: agri-food industry and industries that strengthen voivodship innovativeness and business environment quality.

For the entrepreneurs willing to invest in Kuyavian-Pomeranian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Kuyavian-Pomeranian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include electronic, electric machines, chemical and food sectors.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zone: **Pomeranian SEZ**, **in the following subzones:**

- **Pomeranian SEZ**, subzones: Barcin (u-r), Bydgoszcz (u), Grudziądz (u), Kowalewo Pomorskie (u-r), Łysomice (r), Rypin (u), Świecie (u-r), Toruń (u), Wąbrzeźno (r), Włocławek (u).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, depending on the enterprise size – more information can be found on

[3] Calculations based on the *Statistical Bulletin of the Kuyavian-Pomeranian Voivodship* from the 1st quarter of 2014 and *Statistical Bulletin*, 1st quarter of 2014, www.stat.gov.pl (10 November 2014). A change of 0.25 percentage point was considered as maintaining competitive position.

http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

3. THE PROFILE OF REGIONAL ECONOMY OF LUBLIN VOIVODSHIP

Lublin voivodship is situated in central-eastern Poland. It stands out in terms of exceptionally favourable conditions for the development of food industry because of the agricultural character of the most part of the voivodship and very high specialisation in cultivation of industrial plants, fruit and vegetables. The cleanness of natural environment, multiculturalism and tourist values (in particular The Old Town in Zamość, a UNESCO World Heritage site, the Polesie and Roztocze National Parks as well as 16 landscape parks) create good conditions for the development of tourism (including agritourism) and regional products manufacturing (including ecological food).

Moreover, the advantages of the voivodship are:

- its favourable location on an international traffic route, i.e. pan-European corridor East-West, which makes foreign market accessible, including the ones of Ukraine and Belarus,
- relatively low labour costs (wages and salaries amounting to 87.9% of the national average) and at the same time access to well-qualified human resources in the cities of the region,
- big R&D potential thanks to an important role of academic establishments of Lublin in the Polish science and higher education. In 2010 the Ministry of Science and Higher Education ranked among the best scientific establishments in Poland the following ones: Fertilisers Research Institute in Puławy, National Veterinary Research Institute in Puławy, the Faculty of Humanities, the Faculty of Social Sciences and the Faculty of Law, Canon Law and Administration of the John Paul II Catholic University of Lublin, the Faculty of Law and Administration of the Maria Curie-Skłodowska University of Lublin, the Witold Chodźko Institute of Agricultural Institute in Law, the Pharmaceutical Faculty with Medical Analytics Division of the Medical University of Lublin as well as the Institute for Central-Eastern Europe in Lublin,
- industrial traditions, in particular in reference to transport, machine, chemical and food industries,
- predestination to the development of BPO by virtue of access to well-qualified human resources and their low wage expectations.

The general characteristics of the Lublin voivodship are presented in Table 3.

Table 3. General characteristics of the economy of Lublin voivodship

<table>
<tr><th colspan="2">Feature</th><th>Lublin voivodship</th><th colspan="2">Poland</th><th>Share [%]</th></tr>
<tr><td colspan="6">Market Potential</td></tr>
<tr><td colspan="2">GDP per capita 2012 (PLN/person)</td><td>28374.6</td><td colspan="2">41439.1</td><td>-</td></tr>
<tr><td colspan="2">Population (persons) on 31 December 2013</td><td>2156150</td><td colspan="2">38495659</td><td>5.6%</td></tr>
<tr><td colspan="6">Human Resources Potential</td></tr>
<tr><td colspan="2">Higher education institutions graduates (persons) in 2013</td><td>27326</td><td colspan="2">454986</td><td>6.0%</td></tr>
<tr><td colspan="2">Secondary schools graduates (persons) in 2013</td><td>17420</td><td colspan="2">271333</td><td>6.4%</td></tr>
<tr><td colspan="2">Number of employed persons in 2013</td><td>958</td><td colspan="2">15568</td><td>6.2%</td></tr>
<tr><td colspan="2">Structure of employed persons in 2013</td><td colspan="2">agriculture 26.5%
industry 21.8%
services 51.7%</td><td colspan="2">12.0%
30.5%
57.5%</td></tr>
<tr><td colspan="6">Investment outlays and capital of companies with foreign capital participation in the voivodship</td></tr>
<tr><td colspan="2">Investment outlays (PLN m) in 2012</td><td>520.4</td><td colspan="2">79942.6</td><td>0.7%</td></tr>
<tr><td colspan="2">Capital of companies (PLN n) in 2012</td><td>1526.0</td><td colspan="2">206992.3</td><td>0.7%</td></tr>
<tr><td colspan="6">Special Economic Zones (SEZs) in the voivodship*</td></tr>
<tr><td colspan="6">– Mielec
– Starachowice
– Tarnobrzeg</td></tr>
<tr><td colspan="6">Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)</td></tr>
<tr><td rowspan="2">Counties</td><td>Class A</td><td colspan="4">city of Zamość, city of Lublin, city of Chełm, city of Biała Podlaska</td></tr>
<tr><td>Class B</td><td colspan="4">Łęczna</td></tr>
<tr><td rowspan="2">Communes</td><td>Class A</td><td colspan="4">Zamość (u), Świdnik (u), Lublin (u), Chełm (u), Kraśnik (u), Lubartów (u), Puławy (u), Tomaszów Lubelski (u), Łuków (u), Radzyń Podlaski (u), Biała Podlaska (u), Włodawa (u), Biłgoraj (u), Rejowiec Fabryczny (u), Międzyrzec Podlaski (u), Puchaczów (r), Łęczna (u-r)</td></tr>
<tr><td>Class B</td><td colspan="4">Stoczek Łukowski (u), Krasnystaw (u), Terespol (u), Dęblin (u), Hrubieszów (u), Wólka (r), Lubartów (r), Niemce (r), Jastków (r), Poniatowa (u-r), Janów Lubelski (u-r), Parczew (u-r), Kazimierz Dolny (u-r)</td></tr>
</table>

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations

The number of inhabitants of the voivodship amounts to 2156150 (as of 2013), which is 5.6% of the population of Poland. The age structure in the voivodship in 2013 was as follows:18.4% of the population at pre-productive age, 62.7% at productive age and 18.9% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 19 higher education institutions in which there are 85876 students studying, which makes up 5.5% of all students in Poland. Moreover, 4.8% of the secondary school students in the voivodship attend vocational schools and 5.7% attend technical schools.

The registered unemployment rate in the voivodship amounted to 12.6% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3379.0, which is 87.3% of the average for Poland.

In 2012 Lublin voivodship made a contribution of 3.8 % to the GDP of Poland. Calculated per capita, it amounted to PLN 28374.6with the average for Poland PLN 41439.1. With this result the voivodship takes the 15th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 178.9% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (51.7%) whereas a share of the agricultural and industrial sectors are respectively 26.5% and 21.8% (Central Statistical Office, Regional Data Bank 2014).

The voivodship's specialization is manufacture of food products (24% of sold production of the whole voivodship's industry at the end of 2013). The other important industries are only manufacture of beverages (5%), manufacture of machinery and appliances and manufacture of metal products (4% each).

The region is the main manufacturer of beverages (% of sold production of the whole voivodship's industry at the end of 2013).
When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production). It applies to the following sectors:

- manufacture of food products,
- manufacture of machinery and appliances,
- manufacture of paper and paper products,
- printing and reproduction of recorded media,
- manufacture of pharmaceutical products.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: electronic, electromachinery, chemical and food sectors.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Mielec SEZ, Starachowice SEZ, Tarnobrzeg SEZ in the following subzones:**

- **Mielec SEZ, subzones**: Lubartów (u), Lublin (u), Radzyń Podlaski (u), Zamość (u),
- **Starachowice SEZ, subzones:** Puławy (u),

- **Tarnobrzeg SEZ, subzones:** Horodło (r), Janów Lubelski (u-r), Kraśnik (u), Łuków (u), Łuków (r), Poniatowa (u-r), Ryki (u-r), Tomaszów Lubelski (u), Tomaszów Lubelski (r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 50% - 70%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

4. The profile of regional economy of Lubusz (Lubuskie) voivodship

Lubusz (Lubuskie) voivodship is situated in central-western Poland. It borders Germany, which facilitates international economic cooperation. Fourteen border crossings and the membership of the Pro Europe Viadrina Euroregion and Spree-Neisse-Bober Euroregion create good conditions for economic cooperation. The main socio-economic and administrative centres are Gorzów Wielkopolski, the seat of governmental administration, and Zielona Góra, the seat of self-governmental authorities.

The advantages of the voivodship include:

- a highly beneficial geopolitical location at the Western border, which allows to access attractive sales markets of Germany and other Western Europe countries,
- a beneficial location on an international traffic route, i.e. pan-European corridor East-West, which enables access to the foreign markets,
- a very well-developed regional communications network – both roads and railways, well-developed near-border infrastructure,
- a well-developed network of water transport (the Oder system enables to ship by barges from Lower Silesia to the port complex of Szczecin-Świnoujście and through the Oder-Spree and Oder-Havel channels Lower Silesia is connected to the system of inland waterways of Western Europe),
- very good access to the Internet (in this respect the voivodship belongs to the highest rated regions in Poland),
- voivodship's activity in Euroregions; what particularly distinguishes the Lubusz Land is the transborder location of international Viadrina University offering among others the following courses of study: management, international management, economics, international business administration, German law, German-Polish law, cultural studies,
- a high forest cover, tourist attractions (especially Muskauer Park in Łęknica commune, a UNESCO World Heritage site) as well as numerous lakes, all conducive to the development of tourism,
- good conditions of the development of industry thanks to the presence of higher education institutions offering technical courses of studies and attractive investment offers from special economic zones.

The general characteristics of the Lubusz voivodship are presented in Table 4.

Table 4. General characteristics of the economy of Lubusz voivodship

Feature	Lubusz voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012 (PLN/person)	34282.0	41439.1	-
Population (persons) on 31 December 2013	1021470	38495659	2.7%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	5996	454986	1.3%
Secondary schools graduates (persons) in 2013	6417	271333	2.4%
Number of employed persons in 2013	405	15568	2.6%
Structure of employed persons in 2013	agriculture 8.7% industry 33.2% services 58.1%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	605.9	79942.6	0.8%
Capital of companies (PLN n) in 2012	1958.1	206992.3	0.9%
Special Economic Zones (SEZs) in the voivodship*			
– **Kostrzyn-Słubice** – **Wałbrzych**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2			
Real investment attractiveness RAI	National economy class C Industry class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	city of Zielona Góra, city of Gorzów Wielkopolski	
Communes	Class A	Zielona Góra (u), Gorzów Wielkopolski (u), Nowa Sól (u), Żary (u), Kostrzyn nad Odrą (u), Gubin (u), Żagań (u), Łęknica (u), Słubice (u-r)	
	Class B	Lubrza (r), Kłodawa (r), Zielona Góra (r), Babimost (u-r), Sulechów (u-r), Zbąszynek (u-r), Świebodzin (u-r), Skwierzyna (u-r), Wschowa (u-r)	

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 1021470 (as of 2013), which is 2.7% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 18.4% of the population at pre-productive age, 64.4% at productive age and 17.2% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 8 higher education institutions in which there are 19000 students studying, which makes up 1.2% of all students in Poland. Moreover, 3.1% of the secondary school students in the voivodship attend vocational schools and 2.9% attend technical schools.

The registered unemployment rate in the voivodship amounted to 13.1% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3293.5, which is 94% of the average for Poland.

In 2012 Lubusz voivodship made a contribution of 2.2% to the GDP of Poland. Calculated per capita, it amounted to PLN 34282.0 with the average for Poland PLN 41439.1. With this result the voivodship takes the 9th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 181.9% while the average for Poland amounted to 189.2%.

The structure of employment in the voivodship is characterised by a relatively high share of the service sector (58.1%) whereas shares of the agricultural and industrial sectors are respectively 8.7% and 33.2% (Central Statistical Office, Regional Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of motor vehicles, trailers and semi-trailers (excluding motorcycles) (16% of sold production of the whole voivodship's industry at the end of 2013), manufacture of wood, wood and cork products, except furniture; articles of straw and plaiting materials (14%), manufacture of food products (10%), manufacture of paper and paper products (9%).

The region is the main manufacturer of wood, wood and cork products, except furniture (13% of sold production of the whole voivodship's industry at the end of 2013), leather and leather products (10%).

When it comes to most of the above-mentioned sectors, the voivodship improved its competitive position within the last three years (measured by its share in the country's sold production) [4]. It applies to the following sectors:

- manufacture of leather and leather products,
- manufacture of fabricated metal products (except machinery and equipment),
- manufacture of furniture,
- manufacture of motor vehicles trailers and semi-trailers (excluding motorcycles).

[4] Calculations based on the *Statistical Bulletin of the Lubusz Voivodship* from the 1st quarter of 2014 and *Statistical Bulletin*, 1st quarter of 2014, www.stat.gov.pl (10 November 2014). A change of 0.25 percentage point was considered as maintaining competitive position.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: wood pulp and paper, wood, electronic, food, glass, construction ceramics, machines and biotechnology.

For the entrepreneurs willing to invest in Lubusz voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Lubusz voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include automotive industry and electronics, timber industry, food industry and glass industry.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Kostrzyn-Słubice SEZ and Wałbrzych SEZ, in the following subzones:**

- **Kostrzyn-Słubice SEZ, subbzones:** Bytom Odrzański (u-r), Czerwieńsk (u-r), Dobiegniew (u-r), Gorzów Wielkopolski (u), Gubin (u), Gubin (r), Kargowa (u-r), Kostrzyn nad Odrą (u), Kożuchów (u-r), Lubsko (u-r), Międzyrzecz (u-r), Nowa Sól (u), Rzepin (u-r), Skwierzyna (u-r), Słubice (u-r), Sulęcin (u-r), Zielona Góra (u), Zielona Góra (r),
- **Wałbrzych SEZ, subzone**: Szprotawa (u-r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

5. THE PROFILE OF REGIONAL ECONOMY OF ŁÓDŹ VOIVODSHIP

Łódź voivodship is situated in the centre of Poland and at the same time in the centre of Europe. It is a region with industrial traditions associated with textile industry and manufacture of clothing. Nowadays, thanks to Łódź, Poland's third largest city, other branches of industry develop in the region, in particular the manufacture of household appliances (white and brown goods) and biotech industry.

The advantages of the voivodship are:

- its excellent location in terms of communications; in the voivodship, in the proximity of Stryków, an interchange of highways is planned. This will increase the voivodships attractiveness as a location for investments targeted at domestic market of Poland.
- access to big human resources including not only cheap low-qualified workers but also well-qualified employees, which is possible thanks to the presence of numerous higher and vocational education institutions,
- big R&D potential of the higher education institutions and research establishments of the area of Łódź,

- substantial resources of brown coal thanks to which the surplus of cheap electricity is available in the voivodship,
- large resources of thermal waters which can set the foundations for the development of renewable energy and health resorts in the region,
- attractive investment offers for investors in the locations of special economic zones.

The general characteristics of the Łódź voivodship are presented in Table 5.

Table 5. General characteristics of the economy of Łódź voivodship

Feature	Łódź voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012 (PLN/person)	38656.0	41439.1	-
Population (persons) on 31 December 2013	2513093	38495659	6,5%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	25846	454986	5,7%
Secondary schools graduates (persons) in 2013	17365	271333	6,4%
Number of employed persons in 2013	1248	15568	8,0%
Structure of employed persons in 2013	agriculture 13.2% industry 31.6% services 55.2%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	2565.1	79942.6	3.2%
Capital of companies (PLN n) in 2012	5096.1	206992.3	2.5%
Special Economic Zones (SEZs) in the voivodship*			
– **Łódź** – **Starachowice**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	National economy class C Capital-intensive industry class C Labour-intensive industry class C Trade class C		
Real investment attractiveness RAI	National economy class C Trade class B Tourism class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	Bełchatów, city of Skierniewice, city of Łódź, city of Piotrków Trybunalski	

Communes	Class A	Bełchatów (u), Rawa Mazowiecka (u), Pabianice (u), Łódź (u), Skierniewice (u), Piotrków Trybunalski (u), Zgierz (u), Tomaszów Mazowiecki (u), Łowicz (u), Konstantynów Łódzki (u), Kutno (u), Brzeziny (u), Zduńska Wola (u), Łęczyca (u), Radomsko (u), Kleszczów (r), Andrespol (r), Nowosolna (r), Ksawerów (r), Aleksandrów Łódzki (u-r), Rzgów (u-r)
	Class B	Głowno (u), Sieradz (u), Ozorków (u), Pabianice (r), Sulmierzyce (r), Rawa Mazowiecka (r), Szczerców (r), Stryków (u-r), Tuszyn (u-r), Wieluń (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 2513093 (as of 2013), which is 6.5% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 17% of the population at pre-productive age, 62.4% at productive age and 20.6% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 29 higher education institutions in which there are 92153 students studying, which makes up 6% of all students in Poland. Moreover, 5.2% of the secondary school students in the voivodship attend vocational schools and 5.8% attend technical schools.

The registered unemployment rate in the voivodship amounted to 12.4% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3546.3, which is 95.9% of the average for Poland.

In 2012 Lower Silesian voivodship made a contribution of 6.1 % to the GDP of Poland. Calculated per capita, it amounted to PLN 38656.0 with the average for Poland PLN 41439.1. With this result the voivodship takes the second place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 183.4% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (55.2%) whereas a share of the agricultural and industrial sectors are respectively 13.2% and 31.6% (Central Statistical Office, Local Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of food products (24% of sold production of the whole voivodship's industry at the end of 2013), manufacture of rubber and plastic products (7%), manufacture of other non-metallic mineral products (6%).

The region is the leading manufacturer of wearing apparel (31% of country's sold production in 2013), textiles (24%), pharmaceuticals (13%), other non-metallic mineral products (11%), food products (8%), rubber and plastic products (7%). It also has a 7% share in country's market of printing and reproduction of recorded media.
The voivodship improved its competitive position within the last three years (measured by its share in the country's sold production) [5], when it comes to the following sectors:

[5] Calculations based on the *Statistical Bulletin of the Łódź Voivodship* from the 1st quarter of 2014 and Statistical Bulletin, 1st quarter of 2014, www.stat.gov.pl (10 November 2014).

- manufacture of food products,
- manufacture of rubber and plastic products,
- manufacture of metal (except machinery and equipment),
- manufacture of furniture,
- manufacture of pharmaceuticals,
- manufacture of motor vehicles (excluding motorcycles), trailers and semi-trailers,
- manufacture of computers, electronic and optical products,
- manufacture of other non-metallic products,
- manufacture of paper and paper products.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: energy production, logistics, textile manufacture, agri-food industry, construction, chemical industry, biotechnology.

For the entrepreneurs willing to invest in Łódź voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Łódź voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include textile, wearing apparel and knitting industry, advanced building materials, medicine, pharmacy, cosmetics, energy production (including renewable energy sources), innovative agriculture and agri-food industry, media, informatics and telecommunications, mechatronics.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Katowice SEZ, Łódź SEZ and Starachowice SEZ in the following subzones:**

- **Łódź SEZ in subzones**: Aleksandrów Łódzki (u-r), Bełchatów (u), Brójce (r), Kleszczów (r), Koluszki (u-r), Konstantynów Łódzki (u), Ksawerów (r), Kutno (u), Łęczyca (u), Łowicz (u), Łódź (u), Opoczno (u-r), Ozorków (u), Paradyż (r), Piotrków Trybunalski (u), Radomsko (u), Rawa Mazowiecka (u), Sieradz (u), Skierniewice (u), Sławno (r), Stryków (u-r), Tomaszów Mazowiecki (u), Tomaszów Mazowiecki (r), Ujazd (r), Widawa (r), Wieluń (u-r), Wola Krzysztoporska (r), Wolbórz (u-r), Wróblew (r), Zduńska Wola (u), Zelów (u-r), Zgierz (u), Zgierz (r), Żychlin (u-r),
- **Starachowice SEZ in subzone** Mniszków (r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

6. THE PROFILE OF REGIONAL ECONOMY OF LESSER POLAND (MAŁOPOLSKIE) VOIVODSHIP

Lesser Poland voivodship is situated in central-southern Poland and borders Slovakia. It is an important region for Polish tourism because of its attractive mountain areas in the south of the voivodship (the Tatra mountains and the Podhale) as well as numerous cultural monuments. Cracow, a former capital of Poland, now its second largest city, plays a particular role for Lesser Poland and for the economy of entire Poland. Lesser Poland stands out in terms of a very high density of population, which is chiefly due to the land fragmentation.

The advantages of the voivodship are:

- a convenient location in terms of communication: a main transit corridor from Western Europe to the Ukraine (A4 highway), convenient train connection (the European transport corridor TINA III runs through the region); international airport in Kraków-Balice (the second largest airport in Poland); six road border crossings and one railway border crossing in Leluchów,
- big R&D potential of the higher education institutions and research establishments of Cracow among which scientific establishments ranked by the Ministry of Science and Higher Education in the highest category constitute a numerous group,
- substantial human resources, both low-qualified workers with low wage expectations and well-qualified specialists,
- great tourist attractions, in particular UNESCO World Heritage sites deserve a note: The Old Town in Cracow, Auschwitz-Birkenau, German Nazi Concentration and Extermination Camp (1940-1945), Wieliczka Salt Mine, the Mannerist Architectural and Park Landscape Complex and Pilgrimage Park in Kalwaria Zebrzydowska, wooden churches of southern Lesser Poland in Binarowa, Blizne, Lipnica Murowana, Sękowa) and natural conditions of mountain areas and Carpathian Foothills,
- investment incentives for investors offered in special economic zones.

The general characteristics of the Lesser Poland voivodship are presented in Table 6.

Table 6. General characteristics of the economy of Lesser Poland voivodship

<table>
<tr><th colspan="2">Feature</th><th>Lesser Poland voivodship</th><th>Poland</th><th>Share [%]</th></tr>
<tr><td colspan="5">Market Potential</td></tr>
<tr><td colspan="2">GDP per capita 2012 (PLN/person)</td><td>35163.6</td><td>41439.1</td><td>-</td></tr>
<tr><td colspan="2">Population (persons) on 31 December 2013</td><td>3360581</td><td>38495659</td><td>8.7%</td></tr>
<tr><td colspan="5">Human Resources Potential</td></tr>
<tr><td colspan="2">Higher education institutions graduates (persons) in 2013</td><td>53988</td><td>454986</td><td>11.9%</td></tr>
<tr><td colspan="2">Secondary schools graduates (persons) in 2013</td><td>26649</td><td>271333</td><td>9.8%</td></tr>
<tr><td colspan="2">Number of employed persons in 2013</td><td>1315</td><td>15568</td><td>8.4%</td></tr>
<tr><td colspan="2">Structure of employed persons in 2013</td><td>agriculture 11.9%
industry 31.4%
services 56.7%</td><td colspan="2">12.0%
30.5%
57.5%</td></tr>
<tr><td colspan="5">Investment outlays and capital of companies with foreign capital participation in the voivodship</td></tr>
<tr><td colspan="2">Investment outlays (PLN m) in 2012</td><td>2986.2</td><td>79942.6</td><td>3.7%</td></tr>
<tr><td colspan="2">Capital of companies (PLN n) in 2012</td><td>13148.5</td><td>206992.3</td><td>6.4%</td></tr>
<tr><td colspan="5">Special Economic Zones (SEZs) in the voivodship*</td></tr>
<tr><td colspan="5">– Katowice
– Kraków
– Mielec</td></tr>
<tr><td colspan="5">Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)</td></tr>
<tr><td colspan="2">Potential investment attractiveness PAI_2</td><td colspan="3">National economy class B
Capital-intensive industry class B
Labour-intensive industry class B
Trade class C
Tourism class B
Education class C</td></tr>
<tr><td colspan="2">Real investment attractiveness RAI</td><td colspan="3">Industry class C
Tourism class C
Professional, scientific and technical activities class A</td></tr>
<tr><td colspan="5">Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)</td></tr>
<tr><td rowspan="2">Counties</td><td>Class A</td><td colspan="3">city of Kraków, city of Tarnów, city of Nowy Sącz</td></tr>
<tr><td>Class B</td><td colspan="3">Myślenice, Wieliczka, Oświęcim, Olkusz</td></tr>
<tr><td>Communes</td><td>Class A</td><td colspan="3">Kraków (u), Oświęcim (u), Gorlice (u), Limanowa (u), Bochnia (u), Tarnów (u), Nowy Sącz (u), Bukowno (u), Mszana Dolna (u), Sucha Beskidzka (u), Zielonki (r), Zabierzów (r), Wielka Wieś (r), Mogilany (r), Kłaj (r), Bolesław (r), Tarnów (r), Klucze (r), Niepołomice (u-r), Myślenice (u-r), Olkusz (u-r), Skawina (u-r), Wieliczka (u-r), Kęty (u-r), Zator (u-r), Andrychów (u-r), Alwernia (u-r),</td></tr>
</table>

		Dobczyce (u-r), Wadowice (u-r), Chrzanów (u-r), Świątniki Górne (u-r), Krynica-Zdrój (u-r), Trzebinia (u-r), Brzeszcze (u-r)
	Class B	Zakopane (u), Grybów (u), Nowy Targ (u), Jordanów (u), Siepraw (r), Liszki (r), Michałowice (r), Łapanów (r), Przeciszów (r), Sękowa (r), Osiek (r), Trzciana (r), Dębno (r), Tymbark (r), Bochnia (r), Skrzyszów (r), Żegocina (r), Kocmyrzów-Luborzyca (r), Polanka Wielka (r), Pcim (r), Spytkowice (r), Jerzmanowice-Przeginia (r), Oświęcim (r), Chełmiec (r), Rzezawa (r), Krzeszowice (u-r), Wolbrom (u-r), Libiąż (u-r), Chełmek (u-r), Brzesko (u-r), Piwniczna-Zdrój (u-r), Muszyna (u-r), Sułkowice (u-r), Skała (u-r), Nowy Wiśnicz (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 3360581 (as of 2013), which is 8.7% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 19.2% of the population at pre-productive age, 63.1% at productive age and 17.7% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 32 higher education institutions in which there are 189609 students studying, which makes up 12.2% of all students in Poland. Moreover, 10.4% of the secondary school students in the voivodship attend vocational schools and 9.4% attend technical schools.

The registered unemployment rate in the voivodship amounted to 10% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3614.9, which is 124.8% of the average for Poland.

In 2012 Lesser Poland voivodship made a contribution of 7.4 % to the GDP of Poland. Calculated per capita, it amounted to PLN 35163.6 with the average for Poland PLN 41439.1. With this result the voivodship takes the second place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 192% while the average for Poland amounted to 189.2%.

The structure of employment in the voivodship is characterised by a relatively high share of the service sector (56.7%) whereas a share of the agricultural and industrial sectors are respectively 11.9% and 31.4% (Central Statistical Office, Regional Data Bank 2014).

In the structure of voivodship's trade important role is played by: manufacture of food products (16% of sold production of the whole voivodship's industry at the end of 2013), manufacture of metal products (8%), manufacture of electric appliances (6%), manufacture of rubber and plastic products (5%) and manufacture of metals (5%).

Traditions of breeding animals made Lesser Poland an important manufacturer of leather and leather products when compared to the whole country (19% of country's sold production at the end of 2013). The voivodship also distinguished itself as a manufacturer of metals (9%) and metal products (9%), electric appliances (9%) and clothing (7%).

When it comes to most of the above-mentioned sectors, the voivodship improved its competitive position within the last three years (measured by its share in the country's sold production) [6]. It applies to the following sectors:

- manufacture of food products,
- manufacture of metal products,
- manufacture of leather and leather products,
- manufacture of fabricated metal products (except machinery and equipment),
- manufacture of computers, electronic and optical products,
- manufacture of machinery and appliances,
- manufacture of textiles.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: education, higher education and science, information society, research and development, high-tech sector, tourism and culture.

For the entrepreneurs willing to invest in Lesser Poland voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Lesser Poland voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include:

- biotechnology and life sciences,
- sustainable energy,
- ICT/BPO/SSC,
- chemistry,
- metals and metal products,
- electrotechnical and machine industry,
- creative industries, including free-time industry.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Katowice SEZ, Kraków SEZ, Mielec SEZ, in the following subzones:**

- Katowice SEZ, in subzones: Myślenice (u-r),
- Kraków SEZ, in subzones: Andrychów (u-r), Bochnia (u), Bochnia (r), Bukowno (u), Chełmek (u-r), Chrzanów (u-r), Czorsztyn (r), Dąbrowa Tarnowska (u-r), Dobczyce (u-r), Gdów (r), Kraków (u), Limanowa (u), Niepołomice (u-r), Nowy Sącz (u), Oświęcim (u), Skawina (u-r), Słomniki (u-r), Tarnów (u), Trzebinia (u-r), Wolbrom (u-r), Zabierzów (r), Zator (u-r),
- **SSE** Mielec, in subzone Gorlice (u).

[6] Calculations based on the *Statistical Bulletin of the Lesser Poland Voivodship* from the 1st quarter of 2014 and *Statistical Bulletin*, I quarter of 2014, www.stat.gov.pl (10 November 2014).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

7. THE PROFILE OF REGIONAL ECONOMY OF MAZOVIAN (MAZOWIECKIE) VOIVODSHIP

Mazovian voivodship is situated in central-eastern Poland in the Mazovian Lowlands. It is the largest and most populous region of Poland. It is the most economically developed and the most attractive voivodship for investments and distances all other regions of Poland in terms of GDP per capita. A characteristic feature of the region is its servicisation, which means that in accordance with a high level of economic development modern services like financial intermediation, business services, telecommunications and education play an important role. Moreover, almost all branches of industry have developed in Mazovia, particularly manufacture of means of transportation and petrochemical industry. The main administrative centre is Warsaw, the capital city of Poland, which (together with its suburban area) is one of the most attractive investment areas in the whole country.

The advantages of the voivodship are:

- its central location at the intersection of traffic routes and in the trans-European transport corridors providing connection to the larger cities of Poland and Europe,
- Poland's largest international airport, i.e. Warsaw Chopin Airport, which handles almost 50% of the whole passenger traffic in Poland and maintains ca. 100 regular plane connections with domestic and foreign airports,
- presence of numerous higher education institutions and research establishments,
- the highest GDP per capita rate in the country,
- substantial human resources, including both low-qualified workers with low wage expectations and specialists trained in various fields,
- very high labour productivity compensating a relatively high level of wages and salaries,
- presence of the Warsaw Stock Exchange, the capital centre of Central and Eastern Europe,
- investment incentives for investors offered in special economic zones.

The general characteristics of the Mazovian voivodship are presented in Table 7.

Table 7. General characteristics of the economy of Mazovian voivodship

<table>
<tr><th>Feature</th><th colspan="2">Mazovian voivodship</th><th colspan="2">Poland</th><th>Share [%]</th></tr>
<tr><td colspan="6">Market Potential</td></tr>
<tr><td>GDP per capita 2012 (PLN/person)</td><td colspan="2">67996.0</td><td colspan="2">41439.1</td><td>-</td></tr>
<tr><td>Population (persons) on 31 December 2013</td><td colspan="2">5316840</td><td colspan="2">38495659</td><td>13.8%</td></tr>
<tr><td colspan="6">Human Resources Potential</td></tr>
<tr><td>Higher education institutions graduates (persons) in 2013</td><td colspan="2">79159</td><td colspan="2">454986</td><td>17.4%</td></tr>
<tr><td>Secondary schools graduates (persons) in 2013</td><td colspan="2">38183</td><td colspan="2">271333</td><td>14.1%</td></tr>
<tr><td>Number of employed persons in 2013</td><td colspan="2">2408</td><td colspan="2">15568</td><td>15.5%</td></tr>
<tr><td>Structure of employed persons in 2013</td><td colspan="3">agriculture 11.0%
industry 22.2%
services 66.8%</td><td colspan="2">12.0%
30.5%
57.5%</td></tr>
<tr><td colspan="6">Investment outlays and capital of companies with foreign capital participation in the voivodship</td></tr>
<tr><td>Investment outlays (PLN m) in 2012</td><td colspan="2">39236.5</td><td colspan="2">79942.6</td><td>49.1%</td></tr>
<tr><td>Capital of companies (PLN n) in 2012</td><td colspan="2">98456.7</td><td colspan="2">206992.3</td><td>47.6%</td></tr>
<tr><td colspan="6">Special Economic Zones (SEZs) in the voivodship*</td></tr>
<tr><td colspan="6">– Łódź
– Starachowice
– Suwałki
– Tarnobrzeg
– Warmian-Mazurian</td></tr>
<tr><td colspan="6">Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)</td></tr>
<tr><td colspan="2">Potential investment attractiveness PAI_2</td><td colspan="4">National economy class A
Capital-intensive industry class A
Labour-intensive industry class A
Trade class A
Tourism class A
Education class A</td></tr>
<tr><td colspan="2">Real investment attractiveness RAI</td><td colspan="4">National economy class A
Industry class A
Trade class A
Tourisma class A
Professional, scientific and economic activities class A</td></tr>
<tr><td colspan="6">Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)</td></tr>
<tr><td rowspan="2">Counties</td><td>Class A</td><td colspan="4">Warszawa, city of Siedlce, city of Ostrołęka, city of Płock, pruszkowski, Piaseczno, Warsaw West, Grodzisk Mazowiecki, city of Radom</td></tr>
<tr><td>Class B</td><td colspan="4">Legionowo</td></tr>
</table>

Communes	Class A	Warszawa (u), Ząbki (u), Legionowo (u), Mińsk Mazowiecki (u), Pruszków (u), Piastów (u), Płońsk (u), Podkowa Leśna (u), Ostrołęka (u), Siedlce (u), Płock (u), Garwolin (u), Milanówek (u), Marki (u), Żyrardów (u), Pionki (u), Kobyłka (u), Ciechanów (u), Nowy Dwór Mazowiecki (u), Radom (u), Józefów (u), Sulejówek (u), Ostrów Mazowiecka (u), Otwock (u), Mława (u), Maków Mazowiecki (u), Sokołów Podlaski (u), Zielonka (u), Sierpc (u), Sochaczew (u), Lesznowola (r), Michałowice (r), Raszyn (r), Nadarzyn (r), Stare Babice (r), Słupno (r), Nieporęt (r), Izabelin (r), Czosnów (r), Jaktorów (r), Piaseczno (u-r), Ożarów Mazowiecki (u-r), Konstancin-Jeziorna (u-r), Grodzisk Mazowiecki (u-r), Wyszków (u-r), Łomianki (u-r), Serock (u-r), Kozienice (u-r), Radzymin (u-r), Brwinów (u-r), Tarczyn (u-r), Błonie (u-r), Wołomin (u-r), Halinów (u-r), Grójec (u-r), Białobrzegi (u-r)
	Class B	Przasnysz (u), Węgrów (u), Gostynin (u), Rzekuń (r), Wieliszew (r), Siedlce (r), Radziejowice (r), Kołbiel (r), Garwolin (r), Różan (u-r), Góra Kalwaria (u-r), Karczew (u-r), Łosice (u-r), Mszczonów (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts 5316840 (as of 2013), which is 13.8% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 18.5% of the population at pre-productive age, 62.5% at productive age and 19.0% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 107 higher education institutions in which there are 294413 students studying, which makes up 19% of all students in Poland. Moreover, 9.2% of the secondary school students in the voivodship attend vocational schools and 11.3% attend technical schools.

The registered unemployment rate in the voivodship amounted to 10.1% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 4707.5, which is 124.8% of the average for Poland.

In 2012 Mazovian voivodship made a contribution of 22.7 % to the GDP of Poland. Calculated per capita, it amounted to PLN 67996 with the average for Poland PLN 41439.1. With this result the voivodship takes the first place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 205.3% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (66.8%) whereas a share of the agricultural and industrial sectors are respectively 11% and 11.2% (Central Statistical Office, Regional Data Bank 2014).

In the structure of voivodship's industry important role is played by: electricity, gas, steam and air conditioning supply (19 % of sold production of the whole voivodship's industry at the end of 2013), manufacture of food products (18%) and manufacture of chemicals and chemical products (7%).

As the biggest Polish region the voivodship takes leading positions when it comes to competitive position in the most industries. The voivodship has big shares in county's sold production of the following industries:

- manufacture of chemicals and chemical products (30% of the country's sold production in 2013)
- printing and reproduction of recorded media (28%)
- manufacture of beverages (28%),
- manufacture of basic pharmaceutical products and pharmaceutical preparation (25%),
- manufacture of food products (24%)
- manufacture of computers, electronic and optical products (23%)
- manufacture of electric appliances (21%)

.

The voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production) [7] in the following sectors:

- manufacture of food products,
- manufacture of paper and paper products,
- manufacture of chemicals and chemical products,
- manufacture fabricated metal products (except machinery and equipment), electrical equipment and non-electric household appliances,
- manufacture of computers, electronic and optical products,
- manufacture of electric appliances,
- manufacture of machinery and appliances.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: agriculture, industry, services, tourism (especially foreign), chemical industry, construction, logistics, food industry, growth of innovativeness and competitiveness of the region, teleinformatization, improvement of communication and transport on the region (especially civil aviation) and multifunctional development of rural areas.

For the entrepreneurs willing to invest in Mazovian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Mazovian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include food, construction and BPO sectors.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Łódź SEZ, Starachowice SEZ, Suwałki SEZ, Tarnobrzeg SEZ, Warmian-Mazurian SEZ, in the following subzones:**

- **Łódź SEZ in subzones**: Grodzisk Mazowiecki (u-r), Warszawa (u), Płock (u), Pruszków (u), Raciąż (u), Sochaczew (u), Żyrardów (u),
- **Starachowice SEZ in subzones:** Iłża (u-r), Szydłowiec (u-r),
- **Suwałki SEZ in subzones**: Małkinia Górna (r),

[7] Calculations based on the Statistical *Bulletin of the Mazovian Voivodship* from the 1st quarter of 2014 and *Statistical Bulletin*, I quarter of 2014, www.stat.gov.pl (10 November 2014).

- **Tarnobrzeg SEZ in subzones:** Mińsk Mazowiecki (r), Nowe Miasto nad Pilicą (u-r), Ożarów Mazowiecki (u-r), Pilawa (u-r), Pionki (u), Przasnysz (r), Radom (u), Siedlce (u), Siedlce (r), Węgrów (u), Wyszków (u-r),
- **Warmian-Mazurian SEZ in subzones**: Ciechanów (u), Ciechanów (r), Mława (u), Ostrołęka (u), Płońsk (u).

In the all above-mentioned locations investors can benefit from tax allowances in most voivodship's subregions amounting to 35% - 55% (except from Warsaw, where it amounts from 15% to 35% till 31 December 2017 and from 10% to 30% since 1 January 2018; and except from Ciechanów subregion, where it amounts from 20% to 40%), depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

8. THE PROFILE OF REGIONAL ECONOMY OF OPOLE (OPOLE) VOIVODSHIP

Opole voivodship is situated in the south-western part of Poland. It is a region with very intensive agriculture thanks to which it is a beneficial location for food industry. The high level of agrarian culture and fertile soils also influence positively the quality of location for food industry. The region has long-established industrial traditions, in particular in the manufacture of food, mineral products, metal products, machinery and equipment as well as chemicals and chemical products. Its near-border location and numerous border crossings (both road and railway ones) predisposes the region to cooperation with Germany and the Czech Republic.

The advantages of the voivodship are also:

- its location on main domestic and European traffic routes (A4 highway),
- excellent access to inland shipping thanks to the Oder and the Gliwice-Kędzierzyn Koźle channel (the port in Kędzierzyn is the largest inland port in Poland),
- well-developed communications infrastructure including access to the Internet (the voivodship belongs to the highest rated regions in Poland),
- presence of higher education institutions,
- rich resources for manufacture of mineral products – the possibility of specialisation in sectors supporting the construction industry,
- multicultural mindset of the inhabitants of the voivodship which results in their tolerance and openness to the inflow of foreign capital; this feature is strengthened by the membership of Opole voivodship of the Praded Euroregion and the Silesia Euroregion.

The general characteristics of the Opole voivodship are presented in Table 8.

Table 8. General characteristics of the economy of Opole voivodship

Feature	Opole voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012 (PLN/person)	33071.0	41439.1	-
Population (persons) on 31 December 2013	1004416	38495659	2.6%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	10850	454986	2.4%
Secondary schools graduates (persons) in 2013	6119	271333	2.3%
Number of employed persons in 2013	346	15568	2.2%
Structure of employed persons in 2013	agriculture 11.9% industry 36.3% services 51.8%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	950.8	79942.6	1.2%
Capital of companies (PLN n) in 2012	1708.4	206992.3	0.8%
Special Economic Zones (SEZs) in the voivodship*			
– **Katowice SEZ** – **Starachowice SEZ** – **Wałbrzych SEZ**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2			
Real investment attractiveness RAI	Trade class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	city of Opole	
Communes	Class A	Brzeg (u), Opole (u), Kędzierzyn-Koźle (u), Skarbimierz (r), Tułowice (r), Dobrzeń Wielki (r), Zdzieszowice (u-r), Prudnik (u-r), Namysłów (u-r), Gogolin (u-r)	
	Class B	Chrząstowice (r), Bierawa (r), Łubniany (r), Nysa (u-r), Krapkowice (u-r), Kluczbork (u-r), Ujazd (u-r), Grodków (u-r)	

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 1004416 (as of 2013), which is 7.6% of the population of Poland. The age structure in the voivodship in 2013 was as follows:

16.4% of the population at pre-productive age, 64.7% at productive age and 18.9% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 6 higher education institutions in which there are 30975 students studying, which makes up 2% of all students in Poland. Moreover, 3.1% of the secondary school students in the voivodship attend vocational schools and 2.7% attend technical schools.

The registered unemployment rate in the voivodship amounted to 12.3% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3488.1, which is 92.5% of the average for Poland.

In 2012 Opole voivodship made a contribution of 2.1% to the GDP of Poland. Calculated per capita, it amounted to PLN 33071 with the average for Poland PLN 41439.1. With this result the voivodship takes the 11th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 179.2% while the average for Poland amounted to 189.2%.

The structure of employment in the voivodship is characterised by a relatively low share of the service sector (51.8%) whereas a share of the agricultural and industrial sectors are respectively 11.9% and 36.3% (Central Statistical Office, Regional Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of food products (16% of sold production of the whole voivodship's industry at the end of 2013), manufacture of chemicals and chemical products (16%), manufacture of other non-metallic mineral products (14%) and manufacture of motor vehicles, trailers and semi-trailers (7%).

As the voivodship is one of the smallest regions the voivodship has strong position only on chemical and chemical products market (16% of country's sold production at the end of 2013).

When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production)[8]. It applies to the following sectors: chemical industry, agri-food industry, construction, energy production, machinery production, metal industry, timber industry and non-metallic resources industry.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: food industry, chemical industry and construction.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Katowice, Starachowice, Wałbrzych, in the following subzones:**

- **Katowice SEZ in subzones**: Głuchołazy (u-r), Gogolin (u-r), Kędzierzyn-Koźle (u), Kietrz (u-r), Krapkowice (u-r), Olesno (u-r), Strzelce Opolee (u-r), Ujazd (u-r),

[8] Calculations based on the Statistical Bulletin of the Opole Voivodship from the 1st quarter of 2014 and Statistical Bulletin, I quarter of 2014, www.stat.gov.pl (10 November 2014).

- **Starachowice SEZ in subzones**: Tułowice (r),
- **Wałbrzych SEZ in subzones**: Kluczbork (u-r), Namysłów (u-r), Nysa (u-r), Opole (u), Praszka (u-r), Prudnik (u-r), Skarbimierz (r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

9. THE PROFILE OF REGIONAL ECONOMY OF SUBCARPATHIAN VOIVODSHIP

Subcarpathian voivodship is located on the south-eastern Poland. It borders with Slovakia (in the south) and Ukraine (in the east). The region if famous because of mining: such as sulphur, crude oil and natural gas, as well as minerals: gypsum, sandstones and limestone mined to date in the active modern mines. The main sectors are: agriculture, industry, mining, food, pharmaceutical, aerospace and information technology.

The main advantages of the region are:

- developing aviation industry,
- pharmaceutical industry very well developed, information technology and food processing,
- establishing Subcarpathian Science and Technology Park in Rzeszów,
- good transport connections: an international airport, the A4 motorway, running through the county main transport corridors TINA network,
- mining raw materials such as sulphur, oil and gas, minerals that are mined mainly in the mountainous southern part: sandstone, limestone, gypsum (including gypsum alabaster), ceramic clays, sands (including glass sands) and gravel, and peat, mineral and geothermal,
- large tracts of state forests make a significant supplier of wood and offer the possibility of using wood biomass for renewable energy production,
- availability of highly trained personnel and technical management especially in the aerospace, electrical engineering, chemical (Rzeszów University of Technology and is the largest technical university south-eastern Polish, with the only training centre in the country's civil aviation pilots).

The general characteristics of the Subcarpathian voivodship are presented in Table 9.

Table 9. General characteristics of the economy of Subcarpathian voivodship

Feature	Subcarpathian voivodship	Poland	Share [%]
Market potential			
GDP per capita 2012 (PLN/person)	27713.9	41439.1	-
Population (persons) on 31 December 2013	2129294	38495659	5.5%
Human resources potential			
Higher education institutions graduates (persons) in 2013	20524	454986	4.5%
Secondary schools graduates (persons) in 2013	17549	271333	6.5%
Number of employed persons in 2013	800	15568	5.1%
Structure of employed persons in 2013	agriculture 17.9% industry 30.3% service 51.8%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	3726.4	79942.6	4.7%
Capital of companies (PLN n) in 2012	2463.9	206992.3	1.2%
Special Economic Zones (SEZs) in the voivodship*			
– **Kraków** – **Kraków/ Mielec** – **Mielec** – **Tarnobrzeg**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2			
Real investment attractiveness RAI			
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	City of. Rzeszów, city of Krosno, city of Przemyśl, city of Tarnobrzeg	
Communes	Class A	Rzeszów (u), Krosno (u), Mielec (u), Jasło (u), Łańcut (u), Sanok (u), Dębica (u), Tarnobrzeg (u), Przemyśl (u), Przeworsk (u), Jarosław (u), Stalowa Wola (u), Leżajsk (u), Lubaczów (u), Krościenko Wyżne (r), Trzebownisko (r), Dębica (r), Nisko (u-r)	
	Class B	Radymno (u), Solina (r), Krasne (r), Ostrów (r), Gorzyce (r), Medyka (r), Boguchwała (u-r), Głogów Małopolski (u-r), Nowa Dęba (u-r), Ropczyce (u-r), Dukla (u-r)	

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 2129294 (as of 2013), which is 5.5% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 19.1% of the population at pre-productive age, 63.7% at productive age and 17.2% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 15 higher education institutions in which there are 62731 students studying, which makes up 4.1% of all students in Poland. Moreover, 5.9% of the secondary school students in the voivodship attend vocational schools and 6.7% attend technical schools.

The registered unemployment rate in the voivodship amounted to 14.2% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3231.1, which is 85.7% of the average for Poland.

In 2012 Subcarpathian voivodship made a contribution of 3.7% to the GDP of Poland. Calculated per capita, it amounted to PLN 27713.9 with the average for Poland PLN 41439.1. With this result the voivodship takes the 16th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 180.0% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (51.8%) whereas a share of the agricultural and industrial sectors are respectively 17.9% and 30.3% (Central Statistical Office, Local Data Bank 2014).

Important industry sectors in the voivodship are: manufacture of rubber and plastic products (14% of the value of production sold in whole voivodship at the end of 2013), the production of motor vehicles, trailers and semi-trailers, with the exception of motorcycles (12%), manufacture of other transport equipment (11%), manufacture of food products (9%), manufacture of fabricated metal products, except machinery and equipment (9%), manufacture of products of wood and cork, except furniture, with the production of articles of straw and materials plaiting (8%).
On a national scale region is a leading manufacturer of aviation equipment, which is reflected in a 24-percent share of the region in the national value of sold production of "manufacture of other transport equipment". Subcarpathian is also an important manufacturer of products of wood and cork, except furniture (10% of the national value of production sold in 2013), as well as rubber and plastic products (8%).
When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production) [9].

It applies to the following sectors:

[9] Calculations based on the Statistical Bulletin of the Subcarpathian Voivodship from the 1st quarter of 2014 and Statistical Bulletin, I quarter of 2014, www.stat.gov.pl (10 November 2014). A change of 0.25 percentage point was considered as maintaining competitive position.

- manufacture of motor vehicles, trailers and semi-trailers, with the exception of motorcycles,
- manufacture of other transport equipment,
- manufacture of fabricated metal products, except machinery and equipment,
- metal production,
- food production,
- manufacture of other non-metallic mineral products.

The information on sectors that are found as strategic by the region’s authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: aviation industry, electrical machinery, agri-food, chemical, tourism.

For the entrepreneurs willing to invest in Subcarpathian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Subcarpathian voivodship self-government, based on the observations on investments inflows to the voivodship.

The high potential sectors on the list include:

- aviation industry,
- informatics,
- foundry.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Kraków, Kraków/ Mielec, Mielec, Tarnobrzeg, in the following subzones:**

- **Kraków SEZ, subzones**: Boguchwała (u-r),
- **Kraków/ Mielec SEZ subzones**: Krosno (u),
- **Mielec SEZ subzones**: Dębica (u), Dębica (r), Głogów Małopolski (u-r), Jarosław (u), Jarosław (r), Kolbuszowa (u-r), Leżajsk (u), Leżajsk (r), Lubaczów (u), Łańcut (u), Mielec (u), Ostrów (r), Radymno (r), Ropczyce (u-r), Rzeszów (u), Sanok (u), Sędziszów Małopolski (u-r), Trzebownisko (r), Zagórz (u-r),
- **Tarnobrzeg SEZ subzones**: Gorzyce (r), Jasło (u), Jasło (r), Jedlicze (u-r), Nisko (u-r), Nowa Dęba (u-r), Orły (r), Przemyśl (u), Rymanów (u-r), Stalowa Wola (u), Tarnobrzeg (u).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 50% - 70%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

10. THE PROFILE OF REGIONAL ECONOMY OF PODLASKIE VOIVODSHIP

Podlaskie voivodship is located in north-eastern Poland. It borders with Lithuania and Belarus. It is a mainly agricultural region, with a dynamically developing sector of the food, especially milk, meat, poultry and cereals, as well as the sectors: light, wood, construction and engineering.

Advantages of the Podlaskie voivodship include:

- located in the geographical centre of Europe and the European Union, which plays a crucial role in the transport of both local and international transport,
- located in the province of many transit roads, the most important: Berlin - Warsaw - Grodno - St. Petersburg
- route Warsaw - Helsinki (part of the expressway - Via Baltica, which connects the Baltic countries of western Europe)
- a large area of grassland creates conditions for the breeding of cattle, mostly dairy, which was reflected in the leading position in the market of Podlasie province
- because of the good conditions for livestock development opportunities exist for renewable energy production,
- well-developed higher education:
  - University of Bialystok - the main fields of study: computer science, biology, chemistry, economics, physics, mathematics, environmental protection, law, sociology, philology East Slavic,
  - Bialystok Technical University - the main fields of study: architecture and urban planning, construction, electronics and telecommunications, electricity, engineering, computer science, environmental engineering, mechanical engineering, production management, Highly rated (category I) by the Ministry of Education and Higher Education Institutions:
  - Medical University of Bialystok; Faculty of Medicine and Dentistry and the Faculty of Pharmacy and Laboratory Medicine,
  - University of Bialystok; Faculty of Health Sciences and Department of Physics,

- low labour costs are accompanied by relatively high labour productivity,
- a relatively high level of innovation in comparison to the achieved level of economic development,
- in the region there are four national parks: Białowieża National Park (a UNESCO World Heritage Site), the Biebrza National Park Narew National Park, National Park Wigierski.

The general characteristics of the Podlaskie voivodship are presented in Table 10.

Table 10. General characteristics of the economy of Podlaskie voivodship

Feature		Podlaskie voivodship	Poland	Share [%]
Market potential				
GDP per capita 2012 (PLN/person)		29472.8	41439.1	-
Population (persons) on 31 December 2013		1194965	38495659	3.1%
Human resources potential				
Higher education institutions graduates (persons) in 2013		13971	454986	3.1%
Secondary schools graduates (persons) in 2013		10089	271333	3.7%
Number of employed persons in 2013		453	15568	2.9%
Structure of employed persons in 2013		agriculture 24.2% industry 30.0% services 52.8%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship				
Investment outlays (PLN m) in 2012		475.6	79942.6	0.6%
Capital of companies (PLN n) in 2012		686.5	206992.3	0.3%
Special Economic Zones (SEZs) in the voivodship*				
– **Suwałki** – **Tarnobrzeg**				
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)				
Counties	Class A	City of Białystok, city of Łomża		
	Class B	City of Suwałki		
Communes	Class A	Białystok (u), Wysokie Mazowieckie (u), Łomża (u), Hajnówka (u), Sejny (u), Suwałki (u), Brańsk (u)		
	Class B	Zambrów (u), Siemiatycze (u), Bielsk Podlaski (u), Grajewo (u), Augustów (u), Juchnowiec Kościelny (r), Wasilków (u-r), Supraśl (u-r), Łapy (u-r), Choroszcz (u-r)		

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 1194965 (as of 2013), which is 3.1% of the population of Poland. The age structure in the voivodship in 2013 was as follows:

17.9% of the population at pre-productive age, 63.6% at productive age and 18.5% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 18 higher education institutions in which there are 42057 students studying, which makes up 2.7 % of all students in Poland. Moreover, 2.2% of the secondary school students in the voivodship attend vocational schools and 3.5% attend technical schools.

The registered unemployment rate in the voivodship amounted to 13.3% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3304.2, which is 87.6% of the average for Poland.

In 2012 Podlaskie voivodship made a contribution of 2.2% to the GDP of Poland. Calculated per capita, it amounted to PLN 29472.8 with the average for Poland PLN 41439.1. With this result the voivodship takes the 14th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 174.3% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (52.8%) whereas a share of the agricultural and industrial sectors are respectively 24.2% and 23.0% (Central Statistical Office, Local Data Bank 2014).

Important industry sectors in the voivodship is food production. In 2013 the food industry accounted for as much as 56% of the value of sold production of industry as a whole Podlasie. Apart from food industry there are other important sectors such as: production of wood and cork, except furniture, with the production of articles of straw and plaiting materials (9%), manufacture of rubber and plastic products (6%) and manufacture of machinery and equipment (5%).
On the Poland's scale Podlaskie voivodship is quite important manufacturer of wood and cork, except furniture (7% of the national value of production sold in 2013 and food (6%).
When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production) [10].

It applies to the following sectors:

- manufacture of food products,
- manufacture of products of wood and cork, except furniture,
- printing and reproduction of recorded media.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: food industry, engineering, timber and furniture industry, tourism.

[10] Calculations based on the Statistical Bulletin of the Podlaskie Voivodship from the 1st quarter of 2014 and Statistical Bulletin, I quarter of 2014, www.stat.gov.pl (10 November 2014). A change of 0.25 percentage point was considered as maintaining competitive position.

For the entrepreneurs willing to invest in Podlaskie voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Podlaskie voivodship self-government, based on the observations on investments inflows to the voivodship.

The high potential sectors on the list include:

- food sector,
- machine industry,
- tourism sector.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Suwałki, Tarnobrzeg, in the following subzones:**

- **Suwałki SEZ** subzones :Białystok (u), Grajewo (u), Suwałki (u), Suwałki (r),
- **Tarnobrzeg SEZ** subzones: Łapy (u-r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 50% - 70%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

11. THE PROFILE OF REGIONAL ECONOMY OF POMERANIAN VOIVODSHIP

The economy of Pomeranian voivodship is one of the best developing regional economies in Poland. Its coastal location is conductive to the development of maritime economy in the region: manufacture and repair of vessels and management of ports, fishery or coastal tourism. Recent years are characterized by the robust growth of boat-building: in little shipyards both modern yachts and replicas of medieval boats are built.

The main advantages of the voivodship are:

- two science and technology parks and two special economic zones in the voivodship.
- little 'Silicon Valley' being created in the suburbs of Gdańsk, where among others a manufacturer of access control devices (Satel), a manufacturer of multimedia software (Young Digital Planet) and a R&D centre of Intel Technology Poland have their seats. The company DGT, a well-known manufacturer of modern communications systems, operates near Gdańsk. In Pomeranian voivodship 8% of all Polish IT companies operate and, what is more, 18% of computer software is made in the voivodship,
- Pomerania is the world leader in amber products. In more than 3 thousand small workshops about 10 thousand artisans and artists work and design jewellery. Their annual revenue, especially export revenue, is estimated to more than USD 300m. In 2006 the first in the world Museum of Amber was opened in Gdańsk,
- favourable natural conditions conducive to the development of tourism,

- significant port complex in the region of both domestic and international importance,
- big R&D potential of voivodship's higher education institutions and research establishments. What distinguishes the system of education in the region, is the presence of higher education institutions offering courses of study connected with maritime economy ranked high (category I) by the Ministry of Science and Higher Education (the Institute of Hydroengineering, Maritime Institute).

The general characteristics of the Pomeranian voivodship are presented in Table 11.

Table 11. General characteristics of the economy of Pomeranian voivodship

Feature	Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012 (PLN/person)	39759.4	41439.1	-
Population (persons) on 31 December 2013	2295811	38495659	6.0%
Human Recourses Potential			
Higher education institutions graduates (persons) in 2013	28064	454986	6.2%
Secondary schools graduates (persons) in 2013	15215	271333	5.6%
Number of employed persons in 2013	894	15568	5.7%
Structure of employed persons in 2013	agriculture 7.1% industry 31.0% services 61.9%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	2616.7	79942.6	3.3%
Capital of companies (PLN n) in 2012	15837.1	206992.3	7.7%
Special Economic Zones (SEZs) in the voivodship			
– Pomeranian **– Słupsk**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	The national economy class B Capital-intensive industry class B Industry laborious class B Business class B Tourism class A Education class B		
Real investment attractiveness RAI	The national economy class C Industry class C		

	Business class C Professional scientific and technical activity class C	
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)		
Counties	class A	city of Sopot, city of Gdańsk, city of Słupsk, city of Gdynia
	class B	Puck, Gdańsk
Communes	class A	Sopot (u), Tczew (u), Pruszcz Gdański (u), Gdańsk (u), Krynica Morska (u), Malbork (u), Lębork (u), Słupsk (u), Chojnice (u), Puck (u), Starogard Gdański (u), Wejherowo (u), Kwidzyn (u), Ustka (u), Gdynia (u), Rumia (u), Władysławowo (u), Jastarnia (u), Reda (u), Łeba (u), Kościerzyna (u), Człuchów (u), Kosakowo (r), Pruszcz Gdański (r), Kolbudy (r)
	class B	Hel (u), Skórcz (u), Ustka (r), Sztutowo (r), Kobylnica (r), Starogard Gdański (r), Słupsk (r), Kościerzyna (r), Żukowo (u-r), Bytów (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 2295811(as of 2013), which is 6.0% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 19.5% of the population at pre-productive age, 63.4% at productive age and 17.1% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 27 higher education institutions in which there are 101914 students studying, which makes up 6.6 % of all students in Poland. Moreover, 7.2% of the secondary school students in the Pomeranian voivodship attend vocational schools and 5.8% attend technical schools.

The registered unemployment rate in the voivodship amounted to 11.3% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3906.6, which is 103.6% of the average for Poland.

In 2012 Pomeranian voivodship made a contribution of 5.7% to the GDP of Poland. Calculated per capita, it amounted to PLN 39759.4 with the average for Poland PLN 41439.1. With this result the voivodship takes the 5th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 192.4% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (61.9%) whereas a share of the agricultural and industrial sectors are respectively 7.1% and 31% (Central Statistical Office, Local Data Bank 2014).

In the structure of voivodship's industry important role is played by: manufacture of food products (10% of the value of sold production of industry all over the region at the end of 2013), manufacture of computer, electronic and optical products (7%), the supply of electricity, gas and water (7%) and manufacture of metal products (6%).

As a coastal region Pomeranian voivodship has a significant share of the national output section "Manufacture of other transport equipment". This share amounted in 2013 to 20%.

The Pomeranian voivodship's position is especially strong among the voivodships in:

- manufacture of computer, electronic and optical products (17%),
- manufacture of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials (7%),
- manufacture of fabricated metal products, except machinery and equipment (7%),
- machinery and equipment (6%).

When it comes to most of the above-mentioned sectors, the Pomeranian voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production:[11]

It applies to the following sectors:

- manufacture of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials,
- food production,
- manufacture of other non-metallic mineral products,
- manufacture of fabricated metal products, except machinery and equipment,
- production of computers, electronic and optical products,
- manufacture of electrical equipment,
- manufacture of motor vehicles, trailers and semi-trailers, excluding motorcycles,
- manufacture of furniture.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: high-tech, logistics, maritime, tourism, agri-food sector.

For the entrepreneurs willing to invest in Pomeranian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Pomeranian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include:

- BPO / SSC / BSS,
- energy,
- ICT ,
- logistics,
- chemistry,

[11] Calculations based on the *Statistical Bulletin of the Pomeranian Voivodship* from the 1st quarter of 2014 and *Statistical Bulletin*, I quarter of 2014, www.stat.gov.pl (10 November 2014). A change of 0.25 percentage point was considered as maintaining competitive position.

- automotive.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zone: **Pomeranian SEZ**, **in the following subzones:**

- **Pomeranian SEZ** subzones: Chojnice (r), Człuchów (r), Gdańsk (u), Gdynia (u), Gniewino (r), Krokowa (r), Kwidzyn (u), Malbork (u), Starogard Gdański (u), Sztum (u-r), Tczew (u), Tczew (r)
- **Słupsk SEZ** subzones: Debrzno (u-r), Słupsk (u), Słupsk (r), Ustka (u), Żukowo (u-r)

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

12. THE PROFILE OF REGIONAL ECONOMY OF SILESIAN VOIVODSHIP

Silesian voivodship is one of the most attractive voivodships in terms of investment attractiveness. It is confirmed by a high value of GDP generated by the region. It is influenced by a number of factors connected mainly with voivodship's natural resources which determined the economic development of the region.

The main advantages of the voivodship are:

- the biggest city complex in Poland, creating a unique investment potential
- the biggest traffic junction in Poland, conductive to industry development, with numerous cooperative connections - good connections provided by the Katowice International Airport, A4 highway, E40 road (European route), E75 road (European route) and direct train connection with such cities as Berlin, Vienna, Budapest, Bratislava, Prague, Moscow, Hamburg,
- high level of region’s industrialization, with traditional specializations (mining, steel and machinery industry) but subject to successful restructuring,
- numerous economic subzones, offering attractive investment sites,
- the main courses of study referring to technical science (Częstochowa University of Technology, Silesia University of Technology), which is a result of economic profile of the region,
- the voivodship offers wide investment opportunities, which is confirmed by very high investment attractiveness ranks for the national economy, labour-intensive industry, capital- intensive industry, trade, tourism, financial intermediary, services for business and education.

The general characteristics of the Silesian voivodship are presented in Table 12.

Table 12. General characteristics of the economy of Silesian voivodship

Feature	Silesian voivodship	Poland	Share [%]
Market potential			
GDP per capita 2012 (PLN/person)	44065.9	41439.1	-
Population (persons) on 31 December 2013	4599447	38495659	11.9%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	44687	454986	9.8%
Secondary schools graduates (persons) in 2013	30612	271333	11.3%
Number of employed persons in 2013	1903	15568	12.2%
Structure of employed persons in 2013	agriculture 2.6% industry 39.7% services 57.7%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	6776.9	79942.6	8.5%
Capital of companies (PLN n) in 2012	19124.0	206992.3	9.2%
Special Economic Zones (SEZs) in the voivodship*			
– **Katowice**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	National economy class A Capital-intensive industry class B Labour-intensive industry lass A Business class A Education class B		
Real investment attractiveness RAI	National economy class C Industry class C Trade class C Tourism class C Scientific and technical activity class C		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	city of Tychy, city of Gliwice, city of Chorzów, city of Bielsko-Biała, city of Żory, city of Katowice, city of Świętochłowice, city of Rybnik, city of Dąbrowa Górnicza, city of Mysłowice, city of Ruda Śląska, city of Jastrzębie-Zdrój, city of Zabrze, city of Sosnowiec, Bieruń , city of Piekary Śląskie, city of Bytom, city of Częstochowa, Mikołów, city of Siemianowice Śląskie	

	Class B	Pszczyna, city of Jaworzno, Będzin, Bielsko-Biała
Communes	Class A	Chorzów (u), Świętochłowice (u), Knurów (u), Żory (u), Tychy (u), Gliwice (u), Bielsko-Biała (u), Łaziska Górne (u), Radzionków (u), Ruda Śląska (u), Jastrzębie-Zdrój (u), Czeladź (u), Będzin (u), Rybnik (u), Siemianowice Śląskie (u), Radlin (u), Cieszyn (u), Katowice (u), Mysłowice (u), Piekary Śląskie (u), Sosnowiec (u), Mikołów (u), Bytom (u), Zawiercie (u), Racibórz (u), Bieruń (u), Pyskowice (u), Zabrze (u), Częstochowa (u), Dąbrowa Górnicza (u), Żywiec (u), Wojkowice (u), Tarnowskie Góry (u), Lędziny (u), Wodzisław Śląski (u), Jaworzno (u), Imielin (u), Ustroń (u), Rydułtowy (u), Sławków (u), Lubliniec (u), Wisła (u), Pawłowice (r), Ornontowice (r), Goczałkowice-Zdrój (r), Suszec (r), Bestwina (r), Kozy (r), Świerklany (r), Jasienica (r), Wyry (r), Jaworze (r), Zebrzydowice (r), Bobrowniki (r), Miedźna (r), Ożarowice (r), Porąbka (r), Krupski Młyn (r), Chełm Śląski (r), Olsztyn (r), Psary (r), Buczkowice (r), Skoczów (u-r), Wilamowice (u-r), Pszczyna (u-r), Strumień (u-r), Czechowice-Dziedzice (u-r)
	Class B	Miasteczko Śląskie (u), Pszów (u), Myszków (u), Szczyrk (u), Kalety (u), Czernichów (r), Chybie (r), Mszana (r), Poczesna (r), Herby (r), Wilkowice (r), Godów (r), Poraj (r), Kamienica Polska (r), Gierałtowice (r), Łękawica (r), Świerklaniec (r), Mierzęcice (r), Bojszowy (r), Jejkowice (r), Lipowa (r), Brenna (r), Dębowiec (r), Łodygowice (r), Gaszowice (r), Marklowice (r), Hażlach (r), Węgierska Górka (r), Zbrosławice (r), Mstów (r), Kochanowice (r), Kobiór (r), Ogrodzieniec (u-r), Łazy (u-r), Siewierz (u-r), Czerwionka-Leszczyny (u-r), Żarki (u-r), Krzepice (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own work.

The number of inhabitants of the voivodship amounts to 4599447 (as of 2013), which is 11.9% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 16.9% of the population at pre-productive age, 63.8% at productive age and 19.3% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 41 higher education institutions in which there are 144545students studying, which makes up 9.3 % of all students in Poland. Moreover, 10.9% of the secondary school students in the voivodship attend vocational schools and 12.0 % attend technical schools.
The registered unemployment rate in the voivodship amounted to 9% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 4048,3, which is 107.4% of the average for Poland.

In 2012 Silesian voivodship made a contribution of 12.7% to the GDP of Poland. Calculated per capita, it amounted to PLN 44065.9 with the average for Poland PLN 41439.1. With this result the voivodship takes the 3rd place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 173.3% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (57.7%) whereas a share of the agricultural and industrial sectors are respectively 2.6% and 39.7% (Central Statistical Office, Local Data Bank 2014)

In the structure of Silesian voivodship industry one can see the impact of restructuring typical for regions of the genesis of mining and smelting. This is reflected in the high proportion of the value of sold production of industry throughout the voivodship at the end of 2013. manufacture of motor vehicles, trailers and semi-trailers, with the exception of motorcycles (23%). In the structure of the industry metal production (13%), mining and mining (13%), manufacture of fabricated metal products, except machinery and equipment (8%) and manufacture of food products (7%) still play important role.

Silesian voivodship definitely has a very competitive position in many types of industry as it is the biggest industry area in Poland. Voivodship has significant interests in national output in following sectors:

- metal production (59% of national production in 2013)
- mining (44%),
- manufacture of motor vehicles, trailers and semi-trailers, with the exception of motorcycles (39%),
- manufacture of fabricated metal products, except machinery and equipment (22%),
- manufacture of other non-metallic mineral products (16),
- manufacture of electrical equipment (15),
- manufacture of machinery and equipment not elsewhere classified (15%),
- production of food. (7%).

When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production) [12]. It applies to the following sectors:

- metal production,
- manufacture of rubber and plastic,
- manufacture of motor vehicles, trailers and semi-trailers, with the exception of motorcycles,
- manufacture of fabricated metal products, except machinery and equipment,
- manufacture of other non-metallic mineral products,
- food production,
- manufacture of electrical equipment,
- manufacture of machinery and equipment not elsewhere classified.

[12] Calculations based on the *Statistical Bulletin of the Silesian Voivodship* from the 1st quarter of 2014 and *Statistical Bulletin*, I quarter of 2014, www.stat.gov.pl (10 November 2014). A change of 0.25 percentage point was considered as maintaining competitive position.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: SMEs, R & D sector and the implementation of new technology, agri-food sector, the tourism sector, modernized of traditional industries (coal, steel, coke).

For the entrepreneurs willing to invest in Silesian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Silesian voivodship self-government, based on the observations on investments inflows to the voivodship. The high potential sectors on the list include:

- automotive,
- BPO,
- IT,
- tourism,
- environmental investments,
- renewable energy sources (RES).

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zone: **Katowice SEZ, in the following subzones:**

- **Katowice SEZ subzones:** Bielsko-Biała (u), Bieruń (u), Bytom (u), Czechowice-Dziedzice (u-r), Czerwionka-Leszczyny (u-r), Częstochowa (u), Dąbrowa Górnicza (u), Gliwice (u), Godów (r), Jastrzębie-Zdrój (u), Katowice (u), Knurów (u), Koniecpol (u-r), Lubliniec (u), Miedźna (r), Orzesze (u), Pawłowice (r), Racibórz (u), Radziechowy-Wieprz (r), Rajcza (r), Rudziniec (r), Rybnik (u), Siemianowice Śląskie (u), Siewierz (u-r), Sławków (u), Sosnowiec (u), Tychy (u), Zabrze (u), Zawiercie (u), Żory (u).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 25% - 45%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

13. THE PROFILE OF REGIONAL ECONOMY OF ŚWIĘTOKRZYSKIE VOIVODSHIP

Świętokrzyskie voivodship is situated in the central part of Poland near large urban agglomerations: Kraków, Warszawa and Łódź. Grasslands occupy 650,200 ha (55,6% of the total area), the farming of cattle, horses and poultry prevails. A characteristic element is the Świętokrzyskie Mountains (literally: the Holy Cross Mountains), which lie in the centre of the Kielce Highlands, which in turn influences the development of tourism.

The main advantages of the voivodship are:

- two state universities: the Kielce University of Technology and the Jan Kochanowski University of Humanities and Sciences in Kielce, the part of which is the Faculty of Health Sciences ranked in the highest category 1 by the Ministry of Science and Higher Education,
- favourable conditions for the development of tourism (the Świętokrzyskie Mountains),
- natural resources – deposits of natural resources used in the construction industry (the area of the Świętokrzyskie Mountains), sulphur (near Busko-Zdrój and Grzybów) and mineral waters (Busko-Zdrój, the water called Buskowianka), sulphuric waters (Busko-Zdrój),
- favourable conditions for the development of food industry,
- rich mineral springs of therapeutically waters and a well-developed base of treatment facilities and sanatoria, recreation establishments, hotels and guest houses,
- the presence of quite well-developed branches of industry – smelting industry represented by Celsa Ostrowiec Steelworks (Ostrowiec Świętokrzyski), manufacture of metallic products (Skarżysko-Kamienna), manufacture of machinery and equipment (Starachowice), manufacture of construction materials (Kielce), manufacture of ceramics, founding industry (Stąporków, Końskie), power industry (Połaniec).

The general characteristics of the region are presented in Table 13.

Table 13. The general characteristics of the Świętokrzyskie voivodship

Feature	Świętokrzyskie voivodship	Poland	Share [%]
Market potential			
GDP per capita 2012 (PLN/person)	30726.9	41439.1	-
Population (persons) on 31 December 2013	1268239	38495659	3.3%
Human resources potential			
Higher education institutions graduates (persons) in 2013	13023	454986	2.9%
Secondary schools graduates (persons) in 2013	9838	271333	3.6%
Number of employed persons in 2013	554	15568	3.6%
Structure of employed persons in 2013	agriculture 21.8% industry 27.8% services 50.4%	12.0% 30.5% 57.5%	

Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	1299.7	79942.6	1.6%
Capital of companies (PLN n) in 2012	2925.8	206992.3	1.4%
Special Economic Zones (SEZs) in the voivodship*			
– **Starachowice** – **Tarnobrzeg**			
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	City of Kielce	
	Class B		
Communes	Class A	Kielce (u), Starachowice (u), Ostrowiec Świętokrzyski (u), Sandomierz (u), Skarżysko-Kamienna (u), Sitkówka-Nowiny (r), Połaniec (u-r), Ożarów (u-r)	
	Class B	Miedziana Góra (r), Strawczyn (r), Solec-Zdrój (r), Zagnańsk (r), Staszów (u-r)	

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 1268239 (as of 2013), which is 3.3% of the population of Poland. The age structure in the voivodship in 2013 was as follows:17.3% of the population at pre-productive age, 62.9% at productive age and 19.8% at post productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 15 higher education institutions in which there are 33760 students studying, which makes up 2.2 % of all students in Poland. Moreover, 3.1% of the secondary school students in the voivodship attend vocational schools and 3.9% attend technical schools.

The registered unemployment rate in the voivodship amounted to 14.6% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3286.4, which is 87.2% of the average for Poland.

In 2012 Świętokrzyskie voivodship made a contribution of 2.4% to the GDP of Poland. Calculated per capita, it amounted to PLN 30726.9 with the average for Poland PLN 41439.1. With this result the voivodship takes the 12th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 174.8% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterized by a relatively high share of the service sector (50.4%) whereas a share of the agricultural and industrial sectors are respectively 21.8% and 50.4% (Central Statistical Office, Local Data Bank 2014).

Traditions of mining building materials are important for Świętokrzyskie voivodship. According to that „products of other non-metallic mineral products (23%)" are highly represented in structure of the industry.

Moreover in structure of the industry are: manufacture of metal products (8%), which is also linked to historically shaped industry profile of the region, production of food (15%), as well as production of wood and cork, except furniture, with the production of articles of straw and plaiting materials (6%). In the structure of sales also clearly marked with a production of machinery and equipment (5%).
Świętokrzyskie voivodship because of its size in only a few types of activity reached a significant producer position in mineral industry on a national scale. Which is reflected in a 12 percent share of the region in the national value of sold production from non-metallic mineral products.

When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production):[13]

- manufacture of textiles,
- manufacture of products of wood and cork, except furniture, with the production of articles of straw and plaiting materials,
- manufacture of products from non-metallic mineral,
- machinery and equipment,
- manufacture of food products.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: machine industry, automotive, metallurgy, electronics, precision engineering, agri-food, building materials, construction, mining of mineral resources.

For the entrepreneurs willing to invest in Świętokrzyskie voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and Foreign Investment Agency in cooperation with the Świętokrzyskie voivodship self-government, based on the observations on investments inflows to the voivodship.

The high potential sectors on the list include:

- metal,
- building,

[13]Calculations based on the *Statistical Bulletin of the Świętokrzyskie Voivodship* from the 1st quarter of 2014 and *Statistical Bulletin*, I quarter of 2014, www.stat.gov.pl (10 November 2014). A change of 0.25 percentage point was considered as maintaining competitive position.

- therapeutic spa and rehabilitation.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones**: Starachowice, Tarnobrzeg, in the following subzones:**

- **Starachowice SEZ** subzones: Kielce (u), Końskie (u-r), Morawica (r), Ostrowiec Świętokrzyski (u), Piekoszów (r), Sędziszów (u-r), Skarżysko-Kamienna (u), Starachowice (u), Stąporków (u-r), Suchedniów (u-r),

- **Tarnobrzeg SEZ** subzones: Połaniec (u-r), Staszów (u-r), Tuczępy (r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 45%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

14. THE PROFILE OF REGIONAL ECONOMY OF WARMIAN-MASURIAN VOIVODSHIP

Warmian-Masurian voivodship is situated in the north-eastern part of Poland and as the only voivodship it borders on the Kaliningrad Oblast (the Russian Federation), which gives huge opportunities of cooperation with the markets of Eastern Europe, including Russia. In the voivodship there are also huge opportunities of developing the manufacture of high-quality food, which is determined by the favourable structure of farm size and the presence of unoccupied production space in agriculture.

The main advantages of the voivodship are:

- favourable natural conditions (lake districts, forests) for the development of tourism,
- agro tourism as well as 'clean' (green) industry using renewable energy,
- the planned A1 and Via Baltica routes that give opportunities to develop very good
- connections in the future,
- in the voivodship there is a sea port in Elbląg, which is located on the Vistula lagoon.

Currently a project of building a shipping canal through the Vistula Spit with the cooperation with the Ukraine, which additionally raises the advantages of the region in terms of transport, there are high ranked scientific establishments and courses of study connected with agriculture and food processing: the Institute of Animal Reproduction and Food Research of the Polish Academy of Sciences in Olsztyn and Warmian-Masurian University in Olsztyn: the Faculty of Animal Bioengineering, the Faculty of Environmental Protection and Fishery, the Faculty of Veterinary Medicine, the Faculty of Environmental Management and Agriculture, the Faculty of Food Sciences, The voivodship's largest cities are Olsztyn and Elbląg. Olsztyn is the main centre of food industry, the manufacture of tires, timber industry and tourism. Elbląg is an important centre of heavy industry and tourism. It is also a sea port.

The general characteristics of the voivodship are presented in Table 14.

Table 14. General characteristics of the economy of Warmian-Masurian voivodship

Feature	Warmian – Masurian voivodship	Poland	Share [%]
Market potential			
GDP per capita 2012 (PLN/person)	29780.6	41439.1	-
Population (persons) on 31 December 2013	1446915	38495659	3.8%
Human resources potential			

Higher education institutions graduates (persons) in 2013	12480	454986	2.7%
Secondary schools graduates (persons) in 2013	9625	271333	3.5%
Number of employed persons in 2013	529	15568	3.4%
Structure of employed persons in 2013	agriculture12.7% industry 30.8% services 56.5%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	323.2	79942.6	0.4%
Capital of companies (PLN n) in 2012	1666.2	206992.3	0.8%
Special Economic Zones (SEZs) in the voivodship*			
– **Suwałki** – **Warmian-Masurian**			
Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)			
Potential investment attractiveness PAI_2	Tourism (Class C)		
Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)			
Counties	Class A	City of Olsztyn, city of Elbląg	
	Class B		
Communes	Class A	Ostróda (u), Działdowo (u), Kętrzyn (u), Szczytno (u), Olsztyn (u), Ełk (u), Mrągowo (u), Iława (u), Bartoszyce (u), Górowo Iławeckie (u), Giżycko (u), Elbląg (u), Lidzbark Warmiński (u), Lubawa (u), Stawiguda (r), Nidzica (u-r)	
	Class B	Nowe Miasto Lubawskie (u), Braniewo (u), Dywity (r), Węgorzewo * (u-r), Gołdap (u-r), Olecko (u-r)	

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 1446915 (as of 2013), which is 3.8% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 19% of the population at pre-productive age, 64.7% at productive age and 16.3% at post productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 7 higher education institutions in which there are 39397 students studying, which makes up 2.5 % of all students in Poland. Moreover, 4.4% of the secondary school students in the voivodship attend vocational
schools and 4.0% attend technical schools.

The registered unemployment rate in the voivodship amounted to 18.4% in August 2014, compared to 11.7% in Poland.[14] The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3144.6, which is 83.4% of the average for Poland.

In 2012 Warmian-Masurian voivodship made a contribution of 2.7% to the GDP of Poland. Calculated per capita, it amounted to PLN 29780.6 with the average for Poland PLN 41439.1. With this result the voivodship takes the 10th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 173.3% while the average for Poland amounted to 189.2%.

In comparison with the whole country the structure of employment in the voivodship is characterized by a relatively high share of the service sector (56.5%) whereas a share of the agricultural and industrial sectors are respectively 12.7% and 30.8% (Central Statistical Office, Local Data Bank 2014).

Warmian and Masurian voivodship is specialized in the production of food. In 2013 the food industry accounted for as much as 38% of the value of sold production of industry in whole Podlasie. Noteworthy industries are also: furniture (10%), products of wood and cork, except furniture, with the production of articles of straw and plaiting materials (5%) and metal products (6%).
Warmian and Masurian voivodship is an important producer of furniture (10% of the national value of production sold in 2013). Moreover reaches about 5-percent share in the domestic production of food and wood products.
When it comes to most of the above-mentioned sectors, the voivodship improved or maintained its competitive position within the last three years (measured by its share in the country's sold production).

It applies to the following sectors:

- manufacture of metal products,
- manufacture of clothes,
- manufacture of other non-metallic mineral products.

The information on sectors that are found as strategic by the region's authorities can be important for the investors. The voivodship's strategic sectors mentioned in the strategy of regional development include above all: agri-food industry, furniture, tourism, sports equipment and rubber products.

For the entrepreneurs willing to invest in Warmian-Masurian voivodship the list of the high potential sectors may be a good hint. The list was prepared by the Polish Information and

[14] Unemployed and unemployment rate by voivodships, sub-regions and counties (as of the end of August 2012). GUS.

Foreign Investment Agency in cooperation with the Warmian-Masurian voivodship self-government, based on the observations on investments inflows to the voivodship.

The high potential sectors on the list include:

- food and agriculture,
- wood,
- tourism,
- rubber products,
- renewable energy.

Investments of this kind can be located on preferential conditions in the specially prepared places in the Special Economic Zones: **Suwałki, Warmian-Masurian, in subzones:**

- **Suwałki SEZ**, subzones: Ełk (u), Gołdap (u-r),

- **Warmian-Masurian SEZ, subzones:** Barczewo (u-r), Bartoszyce (u), Bartoszyce (r), Biskupiec (u-r), Dobre Miasto (u-r), Elbląg (u), Iława (u), Iłowo-Osada (r), Kętrzyn (u), Kurzętnik (r), Lidzbark Warmiński (u), Morąg (u-r), Mrągowo (u), Nidzica (u-r), Nowe Miasto Lubawskie (u), Olecko (u-r), Olsztyn (u), Olsztynek (u-r), Orzysz (u-r), Ostróda (u), Pasłęk (u-r), Piecki (r), Pisz (u-r), Szczytno (r), Wielbark (r).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 50% - 70%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

15. THE PROFILE OF REGIONAL ECONOMY OF GREATER POLAND VOIVODSHIP

Greater Poland voivodship is one of the economically best-developed voivodships of Poland. It is characterised by a high concentration of foreign capital invested in Poland and high investment outlays per capita.

The main advantages of the voivodship are:

- its balanced economic development with a high degree of industrialisation and a high level of technology,
- the high potential of human resources, shaped by the presence of the best universities in Poland (ranked in the category 1 by the Ministry of Science and Technology): the Poznań University of Technology, the Poznań University of Economics, Poznań Medical University, the Poznań University of Life Sciences,

- good transport connections among others through A2 highway, which connects Western Europe with Russia and Eastern countries, as well as good plane connections (domestic and international airport) and water connections (the Oder waterway),
- Poznań, one of Poland's oldest and largest cities, is a historical capital of the region of Greater Poland and an important centre of industry, trade, culture, higher education and research, and also belongs to the leading Polish cities in economic terms.

The general characteristics of the voivodship are presented in Table 15.

Table 15. General characteristics of the economy of Greater Poland voivodship

Feature	Greater Poland voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012 (PLN/person)	43364.1	41439.1	-
Population (persons) on 31 December 2013)	3467016	38495659	9.0%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	42062	454986	9.2%
Secondary schools graduates (persons) in 2013	23949	271333	8.8%
Number of employed persons on 2013	1366	15568	8.8%
Structure of employed persons in 2013	agriculture 13.0% industry 35.5% services 51.5%	12.0% 30.5% 57.5%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in 2012	9852.3	79942.6	12.3%
Capital of companies (PLN m) in 2012	16661.9	206992.3	8.0%
Special economic zones (SEZs) in the voivodship			
– **Kamienna Góra** – **Kostrzyn-Słubice** – **Łódź** – **Pomeranian** – **Wałbrzych** – **Wałbrzych/Łódź**			

<table>
<tr><th colspan="3">Distinguishing investment attractiveness ratings PAI _2 and RAI (class A, B and C)</th></tr>
<tr><td>Potential investment attractiveness PAI_2</td><td colspan="2">National economy Class B
National economy Class C
Capital-intensive industry Class C
Labour-intensive industry Class C
Trade Class C
Tourism Class C
Education Class C</td></tr>
<tr><td>Real investment attractiveness RAI</td><td colspan="2">National economy Class C
Industry Class C
Trade Class A
Tourism Class C
Scientific and technical activities Class B</td></tr>
<tr><th colspan="3">Counties and communes distinguished according to the Potential Attractiveness Index for the national economy (PAI1_GN)</th></tr>
<tr><td rowspan="2">Counties</td><td>Class A</td><td>City of Leszno, city of Poznań, city of Konin, Poznań</td></tr>
<tr><td>Class B</td><td>City of Kalisz</td></tr>
<tr><td rowspan="2">Communes</td><td>Class A</td><td>Leszno (u), Turek (u), Luboń (u), Czarnków (u), Chodzież (u), Konin (u), Poznań (u), Kościan (u), Piła (u), Ostrów Wielkopolski (u), Wągrowiec (u), Gniezno (u), Kalisz (u), Słupca (u), Puszczykowo (u), Złotów (u), Koło (u), Tarnowo Podgórne (r), Suchy Las (r), Komorniki (r), Dopiewo (r), Czerwonak (r), Kleszczewo (r), Rokietnica (r), Przykona (r), Swarzędz (u-r), Kleczew (u-r), Kępno (u-r), Środa Wielkopolska (u-r), Kórnik (u-r), Jarocin (u-r), Gostyń (u-r), Śrem (u-r)</td></tr>
<tr><td>Class B</td><td>Baranów (r), Chodzież (r), Kościan (r), Kazimierz Biskupi (r), Lipno (r), Nowy Tomyśl (u-r), Stęszew (u-r), Mosina (u-r), Międzychód (u-r), Grodzisk Wielkopolski (u-r), Pobiedziska (u-r), Ostrzeszów (u-r), Odolanów (u-r), Rawicz (u-r), Oborniki (u-r), Wolsztyn (u-r), Margonin (u-r), Murowana Goślina (u-r), Szamotuły (u-r), Krotoszyn (u-r), Nekla * (u-r), Kostrzyn (u-r), Opalenica (u-r), Pniewy (u-r)</td></tr>
</table>

Explanations:
(u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential attractiveness index, RAI – real attractiveness index
* More information in Appendix in table 3.
Source: Authors' own calculations.

The number of inhabitants of the voivodship in 2013 amounts to 3467016, which is 9% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 19.3% of the population at pre-productive age, 63.6% at productive age and 17.1% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 39 higher education institutions in which there are 143310 thousand students studying, which makes up 9.3% of all students in Poland. Moreover, 12.4% of the secondary school students in the voivodship attend vocational schools and 9.1% attend technical schools.

The registered unemployment rate in the voivodship amounted to 8.1% in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3503.1, which is 92.9% of the average for Poland

In 2012 Greater Poland voivodship made a contribution of 9.4 % to the GDP of Poland. Calculated per capita, it amounted to PLN 43364.1 with the average for Poland PLN 41439.1. With this result the voivodship takes the 4th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 193.7% while the average for Poland amounted to 189,2%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (51.5%) whereas shares of the agricultural and industrial sectors are respectively 13% and 35.5% (Central Statistical Office, Local Data Bank, 2014).

Greater Poland voivodship is one of most developed industrial regions in Poland. In the Greater Poland voivodship structure of industry several sectors stand out: food production (21% of the whole industry voivodship production), and motor vehicle and trailer production except motorcycles (14%), manufacture of electrical equipment (8%), rubber and plastic products production (7%).

As an important industrial region Greater Poland voivodship has a significant share of domestic production in many industries, while maintaining or increasing the region's competitive position in the domestic market in the last three years. This applies to the production of:

- beverage (28% of national production in 2013),
- manufacture of textiles (23%),
- manufacture of machinery and equipment not elsewhere classified (22%),
- manufacture of electrical equipment (22%),
- manufacture of motor vehicles, trailers and semi-trailers, with the exception of motorcycles (16%),
- manufacture of paper and paper products (16%),
- manufacture of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials (15%),
- printing and reproduction of recorded media (15%),
- agricultural machinery and equipment (13%),
- manufacture of fabricated metal products, except machinery and equipment (9%),
- manufacture of other non-metallic mineral products (9%),
- production of food. (7%).

Greater Poland is also an important producer of food (14%), furniture (18%) and clothing.

The regional development strategy of Greater Poland voivodship till 2020 does not mention strategic sectors but suggests creating favourable conditions for the functioning of companies (branches, sectors) or instruments of support. The strategy does not describe market behaviours of business subjects nor it formulates goals whose accomplishment requires macroeconomic solutions, legislative or fiscal changes, nor mentions goals and tasks in the fields which cannot be subject to successful public intervention. It refers particularly to industrial sectors and branches.

Investors may find useful a list of high opportunity sectors in Greater Poland voivodship prepared by Polish Information and Foreign Investment Agency with Local Government of the Greater Poland cooperation. The list is prepared based on observations of trends in investment inflows to the region.

The high opportunity sectors are:
- automotive,
- BPO,
- logistics.

Investments can be attractively located in Special Economic Zones (SEZs). Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following special economic zones**: Kamienna Góra, Kostrzyn Słubice, Łódź, Pomeranian, Wałbrzych, Wałbrzych/ Łódź, in subzones as follows:**
- **Kamienna Góra SEZ**, subzones: city of Ostrów Wielkopolski,
- **Kostrzyn-Słubice SEZ**, subzones: Buk (u-r), Chodzież (r), Nowy Tomyśl (u-r), Przemęt (r), Stęszew (u-r), Swarzędz (u-r), Wronki (u-r),
- **Łódź SEZ**, subzones: Koło (u,) Nowe Skalmierzyce (u-r), Opatówek (r), Ostrzeszów (u-r), Przykona (r), Turek (u),
- **Pomeranian SEZ**, subzones: Piła (u)
- **Wałbrzych SEZ**, subzones: Jarocin (u-r), Kościan (r), Krotoszyn (u-r), Leszno (u), Rawicz (u-r), Śrem (u-r), Września (u-r),
- **Wałbrzych/Łódź SEZ**, subzones: Kalisz (u).

In the all above-mentioned locations investors can benefit from tax allowances amounting to 35% - 55%, depending on the enterprise size – more information can be found on http://www.paiz.gov.pl/investment_support/investment_incentives_in_SEZ.

16. The profile of regional economy of Western Pomeranian voivodship

Western Pomeranian voivodship is characterised by a very good location in view of European markets and Baltic sea countries. Szczecin, the largest city in the voivodship, attracts the highest values of economic potential in the voivodship and has very good transport connections with European highways and seaways.

The main advantages of the voivodship are:

- exceptional location which gives an opportunity to use a wide range of means of transport (water, rail, air and road transport) in the business activity,
- voivodship's rich traditions connected with maritime economy (the manufacture of vessels, fishery, coastal tourism),
- the fact that more than a half of the area of the voivodship is farmland, which gives a chance of investments in and development of agriculture and food industry,
- favourable natural conditions of the development of tourism (Baltic Sea, Wałeckie and Drawskie Lake Districts),
- huge possibilities of renewable energy production (energy plants, wind farms) , which combined with the development of tourism means that Western Pomeranian voivodship may become a symbol of sustainable development with the use of modern technologies supporting regional economy.

The general characteristics of the voivodship are presented in Table 16.

Table 16. General characteristics of the economy of Western Pomeranian voivodship

Feature	Western Pomeranian voivodship	Poland	Share [%]
Market Potential			
GDP per capita 2012. (PLN/person)	35073.2	41439.1	-
Population (persons) on 31 December 20123	1718861	38495659	4.5%
Human Resources Potential			
Higher education institutions graduates (persons) in 2013	15594	454986	3.4%
Secondary schools graduates (persons) in 2012	10497	271333	3.9%
Number of employed persons on 31 December 2013	572	15568	3.7%
Structure of employed persons in 2013	agriculture 8.0% industry 29.2% services 62.8%	12.0% 30.5% 57.5%	

Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN m) in in 2013	1882.3	79942.6	2.4%
Capital of companies (PLN m) in 2013	5096.0	206992.3	2.5%

Special economic zones (SEZs) in the voivodship

- **Kostrzyn-Słubice**
- **Kostrzyn-Słubice/ Słupsk**
- **Mielec/ Kostrzyn-Słubice**
- **Pomeranian**
- **Słupsk**

Distinguishing investment attractiveness ratings PAI 2 and RAI (class A, B and C)	
Potential investment attractiveness PAI_2	Labour-intensive industry Class C Trade Class C Tourism Class A
Real investment attractiveness RAI	National economy Class C Professional, science and technical activities Class C

Distinguished counties and communes according to PAI1_GN		
Counties	Class A	Police, city of Szczecin, city of Świnoujście, city of Koszalin
	Class B	Kołobrzeg
Communes	Class A	Darłowo (u), Szczecin (u), Kołobrzeg (u), Szczecinek (u), Stargard Szczeciński (u), Koszalin (u), Świnoujście (u), Świdwin (u), Sławno (u), Białogard (u), Wałcz (u), Dobra (Szczecińska) (r), Rewal (r), Kołobrzeg (r), Ustronie Morskie (r), Mielno (r), Kołbaskowo (r), Stepnica (r), Police (u-r), Nowe Warpno (u-r), Gryfino (u-r), Międzyzdroje (u-r), Dziwnów * (u-r), Drawsko Pomorskie (u-r)
	Class B	Biesiekierz (r), Kobylanka (r), Osina (r), Świeszyno (r), Karlino (u-r), Dębno (u-r), Goleniów (u-r), Złocieniec (u-r), Nowogard (u-r), Biały Bór (u-r), Barlinek (u-r), Borne Sulinowo (u-r), Kalisz Pomorski (u-r), Czaplinek (u-r), Choszczno (u-r)

Additional information: (u) – urban commune, (r) – rural commune, (u-r) – urban-rural commune.
PAI – potential investment attractiveness, RAI – real investment attractiveness
* For more information see Table 2 in the Appendix.
Source: Authors' own calculations.

The number of inhabitants of the voivodship amounts to 1, 718861 which is 4.5% of the population of Poland. The age structure in the voivodship in 2013 was as follows: 17,7% at productive age and 17.9% at post-productive age (for Poland it was 18.2%, 63.4% and 18.4% respectively).

The main potential for human capital creation in the voivodship lies in 18 higher education institutions in which there are 57815 students studying, which makes up 3.7% of all students in Poland. Moreover, 4.3% of the secondary school students in the voivodship attend vocational schools and 4.1% attend technical schools.

The registered unemployment rate in the voivodship amounted to 15.2 % in August 2014, compared to 11.7% in Poland. The average monthly gross wages and salaries in enterprises sector in the first half-year of 2014 amounted to PLN 3526.7, which is 93.5% of the average for Poland.

In 2012 Western Pomeranian voivodship made a contribution of 3.8 % to the GDP of Poland. Calculated per capita, it amounted to PLN 35073.2 with the average for Poland PLN 41439.1. With this result the voivodship takes the 8th place in the country. The GDP growth rate in the voivodship in the years 2003-2012 amounted to 169.9% while the average for Poland amounted to 189.2 %.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively high share of the service sector (62.8%) whereas shares of the agricultural and industrial sectors are respectively 8.0% and 29.2% (Central Statistical Office, Local Data Bank 2014).

In the Western Pomeranian voivodship structure of industry several sectors stand out: food production (22% of the whole industry voivodship production), wood and cork products, except furniture, articles of straw and plaiting materials (12%), fabricated metal products except machinery and equipment (9%) and motor vehicle and trailer production except motorcycles (4%).

Region is a leading producer of wood and cork products except furniture (14% of domestic production value sold in 2013).

In last three years Western Pomeranian voivodship increased or maintained its competitive position in industry measured with share of domestic value production in:

- food production,
- fabricated metal products except machinery and equipment production,
- motor vehicle and trailer production except motorcycles production,
- rubber and plastic products production.

Information about the voivodship's strategic sectors are important for investors. Based on the strategy of regional development strategic sectors include: marine economy, industry, tourism, well-developed commercial and virtual services, computer industry, telecommunications, IT services, biotechnology, genetic technologies, consulting services, knowledge services and development of telemetry.

Investors may find useful a list of high opportunity sectors in Western Pomeranian voivodship prepared by Polish Information and Foreign Investment Agency with Local Government of the West Pomeranian Region cooperation. The list is prepared based on observations of trends in investment inflows to the region.

The high opportunity sectors are:

- BPO,
- logistics,
- renewable energy sources (wind energy),
- tourism.

Investments can be attractively located in Special Economic Zones (SEZs). Preferential conditions of conducting business activities are offered in the voivodship i.a. in the following

special economic zones: Kostrzyn-Słubice, Kostrzyn-Słubice/Słupsk, Mielec/Kostrzyn-Słubice, Pomeranian, Słupsk.
Each SEZ has it's subzone or subzones as follows:

- **Kostrzyn-Słubice SEZ**, subzones: Barlinek (u-r), Białogard (u), Goleniów (u-r), Gryfino (u-r), Łobez (u-r), Nowogard (u-r), Pełczyce (u-r), Police (u-r),
- **Kostrzyn-Słubice/Słupsk SEZ**, subzone: Karlino (u-r),
- **Mielec/Kostrzyn-Słubice SEZ**, subzone**:** Szczecin (u),
- **Pomeranian SEZ**, subzone: Stargard Szczeciński (u),
- **Słupsk SEZ**, subzones: Biesiekierz (r), Kalisz Pomorski (u-r), Koszalin (u), Polanów (u-r), Szczecinek (u), Tychowo (u-r), Wałcz (u).

In all Special Economic Zones mentioned above investors can get income tax relief from 35% up to 55% depending on the size of the company. Further information can be found on: http://www.paiz.gov.pl/investment_support/sez .

Appendix

Table 1. Potential investment attractiveness of Polish voivodships for the national economy and its selected sections

Voivodship	PAI1_GN National economy	PAI1_GN National economy	PAI1_C Industry	PAI1_G Trade	PAI1_I Hotels and restaurants	PAI1_M Professional, scientific and technical activities
VOIVODSHIPS						
LOWER SILESIAN	0.39	A	A	A	B	A
KUYAVIAN-POMERANIAN	0.29	C	C	E	D	D
LUBLIN	0.17	F	F	F	F	F
LUBUSZ	0.23	E	E	D	C	D
ŁÓDŹ	0.29	C	C	D	E	D
LESSER POLAND	0.32	C	C	B	B	C
MAZOVIAN	0.40	A	A	A	A	A
OPOLE	0.22	E	E	D	E	D
SUBCARPATHIAN	0.23	E	E	E	E	D
PODLASKIE	0.20	F	F	F	E	E
POMERANIAN	0.34	B	C	B	A	B
SILESIAN	0.41	A	A	B	C	A
ŚWIĘTOKRZYSKIE	0.16	F	F	F	F	F
WARMIAN-MASURIAN	0.24	E	E	C	C	E
GREATER POLAND	0.31	C	C	C	D	B
WESTERN POMERANIAN	0.34	B	B	B	A	B

Source: Authors on the basis of the results of statutory research carried out under the guidance of H. Godlewska-Majkowska.

Table 2. Potential investment attractiveness of Counties for the national economy and its selected sections

County	PAI1_GN National economy	PAI1_GN National economy	PAI1_C Industry	PAI1_G Trade	PAI1_I Hotels and restaurants	PAI1_M Professional, scientific and technical activities
LOWER SILESIAN VOIVODSHIP						
Polkowice	0.374	A	A	A	A	A
city of Wrocław	0.373	A	A	A	A	A
Lubin	0.320	A	A	A	B	A
city of Legnica	0.319	A	A	A	B	A
Wrocław	0.318	A	A	A	A	A
city of Jelenia Góra	0.318	A	A	A	A	A
Głogów	0.291	B	B	A	C	B
Zgorzelec	0.284	B	B	B	A	C
Wołów	0.270	B	B	B	C	C
Świdnica	0.269	B	B	B	C	C
Jelenia Góra	0.267	C	B	C	A	C
Oława	0.261	C	C	C	C	C
Wałbrzych	0.254	C	C	C	D	C
Bolesławiec	0.250	C	C	B	B	D
Oleśnica	0.248	C	C	C	B	D
Lubań	0.247	C	C	C	B	D
Trzebnica	0.245	C	C	C	D	C
Kłodzko	0.243	C	C	C	C	D
KUYAVIAN-POMERANIAN VOIVODSHIP						
Toruń	0.365	A	A	A	A	A
Włocławek	0.338	A	A	A	B	A
Bydgoszcz	0.319	A	A	A	C	A
Grudziądz	0.317	A	B	A	C	A
Bydgoszcz	0.262	C	C	C	C	C
LUBELSKIE VOIVODSHIP						
city of Zamość	0.355	A	A	A	A	A
city of Lublin	0.347	A	A	A	A	A

city of Chełm	0.317	A	A	A	C	A
city of Biała Podlaska	0.303	A	A	B	B	A
Łęczna	0.269	B	B	C	D	C
Puławy	0.262	C	C	C	C	C
LUBUSZ VOIVODSHIP						
city of Zielona Góra	0.347	A	A	A	A	A
city of Gorzów Wielkopolski	0.320	A	A	A	A	A
Zielona Góra	0.248	C	C	C	B	C
Świebodzin	0.241	C	D	C	B	D
ŁÓDŹ VOIVODSHIP						
Bełchatów	0.332	A	A	A	A	A
city of Skierniewice	0.322	A	A	A	A	A
city of Łódź	0.315	A	A	A	B	A
city of Piotrków Trybunalski	0.302	A	A	A	C	A
Łódź East	0.263	C	B	B	B	C
Zgierz	0.255	C	B	C	D	C
Pabianice	0.252	C	C	C	D	C
LESSER POLAND VOIVODSHIP						
city of Kraków	0.358	A	A	A	A	A
city of Tarnów	0.322	A	A	A	B	A
city of Nowy Sącz	0.313	A	A	A	A	A
Myślenice	0.285	B	B	C	C	C
Wieliczka	0.282	B	B	B	B	B
Oświęcim	0.272	B	B	B	B	C
Olkusz	0.270	B	B	B	C	C
Kraków	0.266	C	B	C	B	C
Chrzanów	0.263	C	B	C	D	C
Bochnia	0.261	C	C	C	C	C
Wadowice	0.242	C	D	D	D	D
MAZOVIAN VOIVODSHIP						
capital city of Warsaw	0.423	A	A	A	A	A
city of Siedlce	0.361	A	A	A	A	A
city of Ostrołęka	0.353	A	A	A	A	A
city of Płock	0.350	A	A	A	A	A
Pruszków	0.324	A	A	A	A	A
Piaseczno	0.318	A	A	A	A	A
Warsaw West	0.302	A	A	A	A	A
Grodzisk Mazowiecki	0.299	A	A	A	A	B
city of Radom	0.298	A	B	B	D	A
Legionowo	0.280	B	B	B	A	B
Otwock	0.259	C	C	C	B	C
Wołomin	0.258	C	C	C	C	C
Nowy Dwór Mazowiecki	0.245	C	C	C	C	D
OPOLSKIE VOIVODSHIP						

city of Opole	0.333	A	A	A	A	A
Krapkowice	0.261	C	B	B	B	C
Kędzierzyn-Koźle	0.255	C	C	D	C	C
Brzeg	0.250	C	C	C	C	C
Opole	0.241	C	C	D	D	D
SUBCARPATHIAN VOIVODSHIP						
city of Rzeszów	0.357	A	A	A	A	A
city of Krosno	0.339	A	A	A	A	A
city of Przemyśl	0.314	A	A	A	A	A
city of Tarnobrzeg	0.310	A	A	A	A	A
Stalowa Wola	0.257	C	C	C	D	C
PODLASKIE VOIVODSHIP						
city of Białystok	0.368	A	A	A	A	A
city of Łomża	0.295	A	B	A	A	A
city of Suwałki	0.287	B	B	A	B	A
POMERANIAN VOIVODSHIP						
city of Sopot	0.384	A	A	A	A	A
city of Gdańsk	0.363	A	A	A	A	A
city of Słupsk	0.324	A	A	A	B	A
city of Gdynia	0.318	A	A	A	A	A
Puck	0.288	B	B	B	A	B
Gdańsk	0.279	B	B	B	C	C
Nowy Dwór Gdański	0.251	C	C	C	B	D
Lębork	0.244	C	D	D	C	C
Wejherowo	0.244	C	D	C	C	C
SILESIAN VOIVODSHIP						
city of Tychy	0.353	A	A	A	A	A
city of Gliwice	0.345	A	A	A	A	A
city of Chorzów	0.344	A	A	A	B	A
m .Bielsko-Biała	0.337	A	A	A	A	A
city of Żory	0.336	A	A	A	A	A
city of Katowice	0.332	A	A	A	A	A
city of Świętochłowice	0.330	A	A	A	C	A
city of Rybnik	0.330	A	A	A	A	A
city of Dąbrowa Górnicza	0.329	A	A	A	A	A
city of Mysłowice	0.326	A	A	A	B	A
city of Ruda Śląska	0.319	A	A	A	C	A
city of Jastrzębie-Zdrój	0.316	A	A	A	B	A
city of Zabrze	0.310	A	A	A	B	A
city of Sosnowiec	0.310	A	A	B	B	A
Bieruń-Lędzin	0.306	A	A	A	A	B
city of Piekary Śląskie	0.306	A	A	A	B	B
city of Bytom	0.302	A	B	A	E	A
city of Częstochowa	0.301	A	A	B	B	A
Mikołów	0.299	A	A	B	A	A

city of Siemianowice Śląskie	0.295	A	B	A	C	A
Pszczyna	0.293	B	B	B	B	B
city of Jaworzno	0.286	B	B	C	C	B
Będzin	0.277	B	B	B	B	C
Bielsko-Białą	0.270	B	B	B	C	C
Tarnogóra	0.267	C	B	B	B	C
Gliwice	0.266	C	C	C	C	C
Cieszyn	0.262	C	C	B	B	C
Racibórz	0.256	C	C	C	C	C
Wodzisław Śląski	0.249	C	C	C	C	D
Zawiercie	0.243	C	C	D	D	D
ŚWIĘTOKRZYSKIE VOIVODSHIP						
city of Kielce	0.329	A	A	A	B	A
Skarżysko-Kamienna	0.243	C	C	D	E	D
WARMIAN-MASURIAN VOIVODSHIP						
city of Olsztyn	0.352	A	A	A	A	A
city of Elbląg	0.316	A	A	A	B	A
Ełk	0.251	C	C	C	C	C
GREATER POLAND VOIVODSHIP						
city of Leszno	0.359	A	A	A	A	A
city of Poznań	0.352	A	A	A	A	A
city of Konin	0.338	A	A	A	A	A
Poznań	0.304	A	A	A	A	A
city of Kalisz	0.287	B	B	A	C	A
Środa Wielkopolska	0.261	C	C	C	C	C
Turek	0.257	C	C	C	D	C
Piła	0.255	C	C	C	C	C
Chodzież	0.251	C	C	C	D	C
Ostrów Wielkopolski	0.248	C	C	C	C	C
Nowy Tomyśl	0.246	C	C	C	C	D
Oborniki	0.244	C	C	D	E	D
Międzychód	0.241	C	C	C	C	D
WESTERN POMERANIAN VOIVODSHIP						
Police	0.362	A	A	A	A	A
city of Szczecin	0.332	A	A	A	A	A
city of Świnoujście	0.332	A	A	A	A	A
city of Koszalin	0.313	A	A	A	A	A
Kołobrzeg	0.285	B	B	A	A	B
Goleniów	0.260	C	C	D	C	C
Szczecinek	0.254	C	C	C	C	C
Drawsko Pomorskie	0.250	C	C	C	C	D
Sławno	0.249	C	C	C	A	D
Kamień Pomorski	0.249	C	C	C	A	C

Source: Authors on the basis of the results of statutory research carried out under the guidance of H. Godlewska-Majkowska.

Translation and editing of the report: Magdalena Senderowska, Paulina Mechło